FWENTY YEARS?

(1964-1984)

OFFICIAL HISTORY OF
THE ECOTTISH RITE
CHARLEABLE FOUNDATION
OF CANADA



The First Twenty Years

(1964-1984)

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The Official History of
The Scottish Rite Charitable Foundation
of Canada

by

Ill ∴ Bro ∴ The Honourable DONALD METHUEN FLEMING, 33° PC., Q.C., B.A., LL.B., D.C.L., LL.D., K.C.L.J.

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III∴Bro.∴DONALD METHUEN FLEMING, 33°

INTRODUCTION

That the history of The Scottish Rite Charitable Foundation of Canada should be written and preserved has for years been a mounting concern to its Directors. As the ranks of the original Directors have been thinned by death, anxiety has centred on the preservation of their effort and achievement. As early as September 10, 1974 the Board passed a resolution "that the President be authorized to appoint a qualified person to prepare the annals". Roy Austin was the President so authorized; I blush to recall that I was the mover of the motion.

Gordon Ferguson of Moose Jaw was elected to the Board in 1973. He was chosen the next year "to prepare the annals", and undertook the task with alacrity. His objective was to cover the first ten years of the life of the Foundation. He had no sooner commenced work than he was overtaken by illness. In 1976 he reported progress, and expressed to the Board the estimate that the History should be ready for distribution the next year. Before the 1977 Annual Meeting Gordon, too, had been called by death. He had gathered material and engaged in some preliminary work on design, but left nothing written.

With the death of Howard Moore in 1978 I became the last survivor of "The Founding Fathers". At their Meeting in September 1983 the wish was expressed by the Directors that I should record the history, particularly of the early days. Remarks made by the Sovereign Grand Commander, Ill: Bro: Lyle H. Bergstrom, convinced me that this was a task which I should undertake before the last living link with the first Directors is severed. I commenced work December 4, 1983. We were then within a year of completing twenty years since the formation of the Foundation. It seemed logical and convenient, therefore, that my undertaking should cover the first twenty years. The record has accordingly been carried to December 31, 1984.

The Board encouraged me to make the historical account a memoir, rather than a strictly impersonal compilation of facts drawn from the official documents and Minutes. Indeed, it was suggested that the product might be entitled my "Recollections". In the end I have followed a middle course, seeking to write an official history in the light of memory. In April, 1984, the Board of Directors formally adopted it as "The Official History of The Foundation, 1964–1984." I hope it will be of interest to those who come after me. It has been a labour of love.

Toronto, Canada January 31, 1985

Donald M. Fleming

CHAPTER 1

IN THE BEGINNING

In 1951 what came to be known as "The Permanent Fiscal Policy" was adopted by Supreme Council. By 1962 its permanence was so far questioned that the Sovereign Grand Commander, Ill. Bro. R. Coulton Berkinshaw, appointed a Committee to be known as "The Special Committee on General Fiscal Policies" to review the subject, and recommend "such revisions and changes as time and circumstances may seem to demand". The Committee was headed by the Lieutenant Grand Commander, Ill. Bro. Howard B. Moore, and included eight other senior members of Supreme Council. A more important task, however, than advising on fiscal policy lay in store for the Committee.

In his Allocution at the 1962 Session the Sovereign Grand Commander, Ill ∴ Bro ∴ Berkinshaw, said:

"BENEVOLENCE:

The only donation made from the funds appropriated for benevolent purposes was a contribution of \$200.00 to the Ontario Committee for the United Nations International Children's Emergency Fund (UNICEF) towards the cost of filming a pageant entitled, "Children Come Running", to be shown throughout Canada and the border States of the United States of America to promote interest and support of the above mentioned fund.

Under this heading I take the opportunity of suggesting to our membership that consideration be given to a proposal for the establishment of a charitable trust or benevolent foundation, through which projects carrying the approval of this Supreme Council could be undertaken within a broad concept of benevolence, including awards for bursaries or scholarships to students of promise and need, grants in aid, research in any field of benevolence which may contribute to the health, welfare and well-being of humanity in general.

During the past year the Sovereign Grand Commander of the N.M.J., has generously given me access to confidential details pertaining to the formation, development, operation and accomplishments of the Benevolent Foundation established in that Jurisdiction twenty-one years ago, exclusively for such religious, charitable, scientific or educational purposes as that Supreme Council may direct. It is so constituted that contributions, bequests, legacies, de-

vises or transfers to the Foundation are deductible in computing taxable income of the donor or the value of an Estate for Succession Duties.

I firmly believe that an endeavour of this nature would serve to supplement our efforts to attain rather than lead us away from what should be our primary objective of the interest and welfare of our order and request the Special Committee on General Fiscal Policies to take this subject under consideration."

This is the first record of the proposed formation of a "charitable trust or benevolent foundation" in the Proceedings of Supreme Council. To Ill. Bro. Berkinshaw is due the full credit for initiating the proposal. The Committee on the Allocution reported that it had "noted with interest the Sovereign Grand Commander's suggestion that consideration might be given to some type of charitable foundation and feel that this might be referred to the Special Committee on General Fiscal Policies for their consideration". They could hardly have sought study of it by a more competent group of Brethren. The Committee submitted only a brief progress Report to the 1962 Session, but the adoption of the Report of the Committee on the Allocution gave approval in principle to Ill. Bro. Berkinshaw's proposal.

In his 1963 Allocution Ill \therefore Bro \therefore Berkinshaw returned to the same theme:—

"At our last Annual Session the Supreme Council agreed in principle that consideration be given to the establishment of a charitable Trust or Benevolent Foundation through which projects carrying the approval of Supreme Council could be undertaken within the broad concept of benevolence, including awards for bursaries or scholarships to students of promise and need; grants in aid; research in any field of benevolence which may contribute to the health, welfare and well-being of humanity, in general, and agreed that this subject be referred to the Special Committee on General Fiscal Policies for its consideration. We look forward, with interest, to receiving the report on this subject, which will be presented at this Session."

The Committee on the Allocution recorded its solid support:—"We join with the Sovereign Grand Commander in expressing our interest and support in the report of the "Special Committee on General Fiscal Policies" in the matter of the establishment of a Charitable Trust or Benevolent Foundation which would enable us to expand and broaden our service to mankind in the field of Benevolence".

Significantly, the Committee was headed by Ill: Bro: Walter H. Gibson. Its report and recommendation were adopted by Supreme Council.

Then the Report of the Special Committee on General Fiscal Policies was presented by Ill \therefore Bro \therefore Howard B. Moore, its Chairman, as an interim report. At its very outset the Committee, after the briefest reference to the subject of capital funds of Supreme Council, turned to the proposal of Ill \therefore Bro \therefore Berkinshaw, and in these eloquent and challenging terms placed the issue before Supreme Council:—

"Before we can make recommendations as to new goals we respectfully request that Council take an important decision as to our future course.

Are we to continue to live within ourselves, to provide only security for the Council's future, including probable increases in expenses, reasonable promotional effort, etc. — or — do we have a desire to take part as a body in one of the great needs of the needful world in which we live? If we are to continue to grow and operate as a Council with the influence it can and should have, your Sovereign Grand Commander and your Committee feel that we have an obligation to ourselves and to others to extend our vision into broader fields.

In order to bring this question into sharp focus and to provoke appropriate debate your Committee recommends that a suggestion submitted to it by the Most Puissant Sovereign Grand Commander be adopted. In the opinion of your Committee our funds are now, and promise to continue to be, in a position that will meet our requirements adequately and, looking out upon the humanitarian works on every hand crying for support, the recommendation is that Supreme Council establish a Foundation to enable the Ancient and Accepted Scottish Rite to take part in some work beyond its own walls.

In making this suggestion we do not envision a "drive" for funds but rather a Foundation that would meet all legal requirements, that would operate under a duly appointed Board of Trustees, be set up in such a manner that gifts and bequests to the Fund would not be taxable, and that upon determination by the Council of the work to which the income of the Fund (and perhaps with limited rights of encroachment upon capital) would be devoted, the sum of \$100,000 be transferred from our general funds to the Foundation as a base.

Your Committee is confident that the trend of our Fund makes this a sound proposal.

Your Committee also feels that there are and will be Scottish Rite Masons who would like to find the name of the Rite identified with some good, sound, well-administered, well-known, humanitarian work; as an example only, we mention research in juvenile delinquency, or the mental illness of children. Members of this Committee have been impressed with the opportunities for assistance which they present.

There would necessarily be considerable detail work required in establishing a Foundation, but, until Council has taken a decision as to policy in this matter there would be no point in presenting a mass of detail here.

Your Committee therefore asks that you act upon its recommendation after appropriate debate at this Session so that your Committee with your decision, can work toward a finalization of the project for next Session."

The interim Report was received and debated. On motion, Supreme Council "endorsed in principle the setting up of a Benevolent Foundation and requested the Committee to prepare the necessary steps toward this result." The project had won powerful support. The Committee had presented it not as a channel of assistance or benefit to members of the Scottish Rite, but as a challenge to them to aid others in the name of true charity.

Ill.. Bro.. Berkinshaw in his Allocution had instanced various possible worthy objects within the broad concept of benevolence: "awards for bursaries or scholarships to students of promise and need; grants in aid; research in any field of benevolence which may contribute to the health, welfare and well-being of humanity, in general." The Special Committee was much more specific. It mentioned, "as an example only", "research in juvenile delinquency, or the mental illness of children." Much remained to be done in selecting an object or objects of the benevolence, but those concerned were clearly of one mind in defining it as humanitarian. A task of selection remained.

The same creative charitable spirit was also at work in The Grand Lodge of Canada in the Province of Ontario. In the summer of 1964 it took parallel action to incorporate the Masonic Charitable Foundation of Ontario. This was a Provincial creation, incorporated under the laws of the Province of Ontario. Initially, it chose as its object assistance to students attending universities in Ontario who encountered financial crises in mid-term. In later years it broadened and diversified its charitable objects. It has proved an invaluable channel for Masonic Charity of the Craft in Ontario.

The 1964 Annual Session of Supreme Council was held in Ottawa. It took some far-reaching decisions. Ill :. Bro :. Berkinshaw completed his three-year term as Sovereign Grand Commander and was succeeded by Ill :. Bro :. George C. Derby of British Columbia. Two Brethren were elected to Active Rank who were destined to be closely linked to the Foundation, Ill :. Bro :. Roy W. Austin of Calgary, and myself (of Toronto). Ill :. Bro :. Ralph H. Rutherford, 33°, of Hamilton was appointed Assistant Grand Secretary-General. He, too, was destined to play a leading role in serving the Foundation.

In his final Allocution III. Bro Berkinshaw called on the Special Committee 'to submit definite recommendations for consideration of and action by Supreme Council, which may set the pattern of its progress and development for future years."

But the Special Committee had already done its work and done it thoroughly. It had carefully examined the work of the Canadian Association for Retarded Children, and had concluded that it should select research in that field as its adopted object. Its Report was written in specific terms:—

"It is felt that the results shown fully justify the action of Council in approving in principle the establishment of a Charitable Foundation.

This brings your Committee to a specific recommendation as to a field or project for the immediate future.

There are many needs for financial support, most, if not all, worthy of support and well administered, but it is the consensus of your Committee that Supreme Council should concentrate on one, at least unless and until funds for such purposes enable Supreme Council to support others.

On capital of \$100,000 earnings could not be expected to exceed \$5,000 per annum, and to fragment our funds would appear to be unwise.

Your Committee therefore recommends that Supreme Council's support be given to a specific field of the work of the Canadian Association for Retarded Children, and that Supreme Council's particular segment of their work be research.

There can be no question as to need in this field. Great strides are being made and results are encouraging, but when the magnitude, the prevalence, and the incidence of retardation are considered, this recommendation

is made with supreme confidence that this field offers an excellent project for Supreme Council.

Your Committee recommends, therefore, that, upon approval of the above project:

- a Charitable Foundation be established, under control of this Supreme Council; and that Council authorize,
 (a) the employment of any professional services required, and (b) the payment of all costs incurred in obtaining a Charter or Letters-Patent.
- 2. unless otherwise directed by this Supreme Council, or by any donor to the Foundation, the funds of the Foundation be applied to research, and, as an initial project, Supreme Council collaborate with the Canadian Association for Retarded Children.
- 3. upon incorporation of the said Charitable Foundation, securities to the face value of \$100,000 be transferred, under deed of gift, from the funds of Supreme Council to those of the Foundation, and, pending such incorporation Supreme Council's Trustees pay the sum of \$5,000 as a contribution to the Canadian Association for Retarded Children for research purposes, on conditions and terms to be agreed upon between the said Trustees and the said Association."

This landmark Report of the Committee was adopted unanimously. After the fullest explanation, two further measures were taken by Supreme Council. Ill. Bro. Walter H. Gibson was named Chairman of a Foundation Committee, with power to select its personnel "for the furtherance of the formation of such a Foundation" as the Committee on General Fiscal Policies had recommended. The second measure was to amend the Statutes to authorize "grants for benevolent purposes and appropriations to any Foundation or Trust which may be established or approved by this Supreme Council for charitable purposes." Supreme Council also approved "the initial step in collaboration with the Canadian Association for Retarded Children in making a gift for Research purposes in the amount of \$5,000 during our present fiscal year."

Announcement of Supreme Council's historic decision was made to a gathering of over 500 Members and their wives at the Sovereign Grand Commander's Banquet on the evening of September 9th, 1964 in the Ballroom of the Chateau Laurier, Ottawa. Those fortunate to be present on that occasion can never forget the event. Ill. Bro. C. M. Pitts, Past Sovereign Grand Commander, presided

and Ill.: Luther A. Smith, Sovereign Grand Commander, Southern Jurisdiction, U.S.A. and Ill.: George E. Bushnell, Sovereign Grand Commander, Northern Masonic Jurisdiction, U.S.A., were in attendance, and responded to the Toast to the Visitors. Two speeches unannounced in the Program, however, "stole the show", like Lincoln's Speech at Gettysburg. The decision to incorporate the Foundation, the selection of mental retardation among children as the object of its benevolence, and the initial gift of \$5,000 to support research into the causes of mental retardation were deemed of such importance that the two leaders most responsible for the action taken were called upon to address the meeting on the subject. Ill: Bro: R. Coulton Berkinshaw gave a thorough and illuminating account of the steps taken and to be taken to bring the Foundation into being. Ill : Bro : Walter Gibson contributed one of the most moving presentations ever heard at a meeting under the auspices of Supreme Council. It is a pity that it was not recorded. It was a plea for sympathetic understanding of the lot of mentally retarded children, the solemn duty of bringing intelligent effort to their assistance, and the opportunities that new medical science was offering to meet the problem of mental retardation. Walter Gibson had not been known as a man of eloquence, but that evening he was given an extraordinary power of utterance. His speech moved his audience first to the point of tears, then to action. It provided just what was needed at that fateful moment—a spiritual energizing force behind the launching of The Scottish Rite Charitable Foundation of Canada. An inescapable challenge to dynamic action had been squarely presented and resolutely accepted. The die was cast.

CHAPTER 2

THE FOUNDING FATHERS

Walter Gibson set to work at once to select those who would be associated with him in the creation of the Foundation. He acted in consultation with the present and Past Sovereign Grand Commanders, particularly Ill. Bro. Berkinshaw. It was early decided that the number should be limited to six, that the organizers should become the first Directors of the Foundation and, to facilitate their attendance at the numerous meetings, they should be chiefly drawn from Toronto and Hamilton. Ill. Bro. Gibson's choice of his colleagues fell on Ill. Bros. Berkinshaw, Wade, Moore, Welby, Scace and Fleming.



Walter Hodgins Gibson, 33°, was a kindly, gentle and very friendly man of 67 years of age. Born in St. Catharines, he had spent his life in Tillsonburg. After service with the Royal Air Force in the First World War he had become President of his own shoe company. His appointment to head the Foundation coincided with his retirement from business. Throughout his life he had been active in Church and community service. In 1957 he had been named "Citizen of the Year" by the Tillsonburg and District Chamber of Commerce for what was described as "service to our community beyond the call of good citizenship".

He was initiated into Masonry in 1921 at the age of 25 in King Hiram Lodge No. 78, and served as its Worshipful Master in 1931 and as District Deputy Grand Master of Wilson District in 1941. He joined the Scottish Rite in 1942 in London Lodge of Perfection, the London Sovereign Chapter of Rose Croix, and then the Moore Sovereign Consistory in Hamilton in 1943. He was coroneted Honorary Inspector-General, 33° in 1955, and crowned Sovereign Grand Inspector-General in 1959. He enjoyed the profound respect of his colleagues in Supreme Council.



Richard Coulton Berkinshaw, 33°, was one of the most distinguished men ever to occupy the office of Sovereign Grand Commander. Born in Toronto in 1891, his life was spent in that city. apart from service overseas in the 124th Battalion, Canadian Expeditionary Force, and the 12th Battalion of Canadian Engineers in the First World War, and in Ottawa as a dollar-a-year man with the Department of Munitions and Supply, the Industries Control Board, and Polymer Corporation in the Second World War. He rose to the highest rank in the business and industrial life of Can-

ada. He was President and Chairman of Goodyear Tire and Rubber Company, Vice-President of Crown Trust Company, and The Mutual Life Assurance Company, a Director of the Bank of Montreal, and of a large number of other eminent corporations. The breadth of his interests was extraordinary, and his service extended over an equally wide field. Indeed, his service was coextensive with his interests. At one time or another he had been or still was Chancellor of the University of Trinity College, Honorary President of The Toronto Mendelssohn Choir, President of the Toronto Board of Trade. President of the Canadian Council of the International Chamber of Commerce, President of the Canadian National Exhibition Association, President of the Metropolitan Toronto Industrial Commission, President of the Boy Scouts Association of Canada, President of the Queen Elizabeth Hospital, President of the Canadian Manufacturers' Association, President of the Citizens' Research Institute of Canada, a Life Member of the Advisory Board of the Salvation Army and of the Advisory Board of the Big Sisters' Association of Canada. Even this formidable list is far from exhaustive.

Many honours were bestowed upon him: Commander of the Order of the British Empire, one of Her Majesty's Counsel, Honorary Doctor of Laws, the Centennial Medal (Canada) 1967, the Civic Award of Merit (Toronto) 1967, and Silver Wolf (Boy Scouts of Canada) 1964.

These myriad activities were never permitted to encroach upon the duty he owed and rendered to his Church. He served it as a layman, counsellor, Church Warden, a member of the Diocesan Synod and Executive. It was said of him in his Church life that "he gave strength to clergy and laity alike". His Masonic career was equally distinguished. Initiated into Georgina Lodge No. 343 in 1929 at the age of 38, he served it as Worshipful Master in 1937. He held office in Grand Lodge for twenty years, including membership on the Board of General Purposes from 1946 to 1965, and Chairman of the Committee on Audit and Finance from 1947 to 1963. He could undoubtedly have been elected to the office of Grand Master had he so desired. In 1938 he joined the Scottish Rite in Toronto, and Moore Sovereign Consistory in Hamilton. He served the Toronto Lodge of Perfection as T.P.G.M. in 1945. In 1942 he was coroneted an Honorary Inspector-General, 33°, commencing in Supreme Council a career of the highest distinction which continued for 28 years.

In 1948 he was crowned a Sovereign Grand Inspector-General; from 1958 to 1961 he served as Lieutenant Grand Commander, and from 1961 to 1964 as Sovereign Grand Commander. Among the numerous achievements of his final office he undoubtedly ranked the launching of the Foundation as the first. To it he dedicated his great gifts of leadership, experience, urbanity, drive, tenacity, meticulous concern for detail, patience, courtesy and foresight.



Thomas Kingsmill Wade, 33°, at 81 years of age was the oldest member of the group, but still enjoying good health and vigour. He was a man's man. A lifelong bachelor, Tom Wade loved the company of men, particularly his fellow Masons. Born in Toronto in 1883 he spent his entire life in that City, except for his service overseas in the First World War, and in Ottawa in the Second World War. As a Captain in the Canadian Army he took part in the Battle of Vimy Ridge in 1917, and was mentioned in dispatches.

His active career was spent in the tea business. He entered it as an office boy, and rose to the presidency of his company. During the Second World War he served as Tea Controller for Canada, and was appointed a member of the Order of the British Empire in the postwar honours. Both because of his chosen career and his initials he was commonly spoken of as "Tea-Kettle Wade". He retired from business in 1948.

His chief hobby was sailing. An ardent yachtsman, he spurned any form of auxiliary power. He held the office of Commodore of the Royal Canadian Yacht Club, and as such founded the R.C.Y.C. Junior Club. He was an officer of several yacht racing associations.

Always a devoted Churchman, regular in attendance, he was a representative of his Church to the Synod. He and Coulton Berkinshaw were members of the same congregation.

His career in Masonry was most distinguished. Initiated in Ashlar Lodge in 1909 at the age of 26, he duly served it as Worshipful Master. He was also an Honorary Member of Ionic Lodge. He served Grand Lodge as Grand Senior Warden in 1930. Joining Toronto Lodge of Perfection October 10, 1910, Toronto Sovereign Chapter of Rose Croix April 1, 1915, and Moore Sovereign Consistory May 9, 1924 in Hamilton, he served as T.P.G.M. of Toronto Lodge of Perfection in 1927. In 1932 he was coroneted Honorary Inspector-General, 33°, and served as a Member of Supreme Council for 33 years. In 1941 he was crowned a Sovereign Grand Inspector-General; from 1949 to 1952 he served as Illustrious Deputy for Ontario, from 1952 to 1955 as Lieutenant Grand Commander, In 1935 he became a Member of the Royal Order of Scotland. From 1955 to 1958 he served as Sovereign Grand Commander of Supreme Council. Thereafter his views continued to carry great weight in Supreme Council.

Tom Wade had given full support to the formation of the Foundation, and he was an obvious choice for the Committee selected by Walter Gibson; besides, he was the Grand Treasurer-General. He participated in the meetings of the Committee in the autumn of 1964, was one of the applicants for incorporation of the Foundation, and was a cosigner of the Memorandum of Agreement. Before the Letters Patent were issued, however, Ill :. Bro :. Wade died at his home on January 20, 1965. His loss was mourned throughout the Rite, but by none more than his colleagues on the Committee. Tom Wade's name does not appear in the Letters Patent incorporating the Foundation, but his memory is honoured as one of its founding fathers.



Howard Brown Moore, 33°, was destined to play an influential role not only in the formation of the Foundation, but also in guiding its activities throughout its first decade. He was one of the most popular Members ever to serve in Supreme Council. Of an intensely practical nature, his feet were firmly planted on the ground. He was direct in approach, candid and vigorous in utterance, decisive in deliberation, but ever friendly and considerate of others. He spurned cant, hypocrisy and make-believe.

Born in Western Ontario in 1893, he was already 71 years of age when

he was appointed to the organizing Committee. Following his schooling in Michigan, Barrie and Toronto, he entered upon a commercial career centred in Toronto, but involving wide travel throughout Canada. He became a leading figure in the automobile business in Canada, eventually serving as Managing Director of the Federation of Automobile Dealer Associations of Canada. He retired in 1963, and was free to give the Foundation a very high place in his interests and activities.

Indeed, service to others had characterized his life. He had served his Church as Treasurer and in the Sunday School. He had been President of Central Y.M.C.A., President of the Federation for Community Services in Toronto, and a Director of the Ontario Motor League.

He was a very prominent Mason. Initiated in St. Andrew's Lodge No. 16 in 1920, he quickly entered upon a brilliant career in Scottish Rite Masonry. In 1921 he joined the Toronto Lodge of Perfection, in 1922 the Toronto Sovereign Chapter of Rose Croix, and in 1927 Moore Sovereign Consistory in Hamilton. In 1930 he was T.P.G.M. of the Toronto Lodge of Perfection, and in 1935 Most Wise Sovereign of the Chapter of Rose Croix, one of the very few persons to preside in both Bodies. In 1934 he was coroneted Honorary Inspector-General, 33°, and in 1942 was crowned Sovereign Grand Inspector-General. From 1961 to 1964 he served as Lieutenant Grand Commander. It was undoubtedly the wish of all Members of Supreme Council that he accept election as Sovereign Grand Commander in 1964 for the ensuing triennium, but to the disappointment of all he declined advancement to the highest office. None the

less, he continued thereafter to be looked upon as holding a very senior position of influence and respect in Supreme Council, and the Foundation enjoyed a larger share of his time and interest than might have been the case had he given three years of total commitment to the Office of Sovereign Grand Commander. He did serve Supreme Council as Grand Treasurer-General from 1968 to 1976. In 1970 a grateful Supreme Council conferred upon him the Honorary Rank of Past Sovereign Grand Commander, an honour which both recognized his monumental service to the Scottish Rite, and also placed him in a rank to which he had earned just entitlement.



Wilbert George Welby, 33°, was destined to leave an imperishable mark on the Scottish Rite. A lifelong resident of Hamilton, a barrister, and a bachelor, he commanded the unqualified confidence of all Members of Supreme Council. Born in 1900, he was 64 years of age when he was coopted to the organizing Committee.

Bert Welby was a devoted Churchman. He had filled numerous offices in his congregation, and served it as Churchwarden and Lay Delegate to the Synod. He was an active member of the Upper Canada Bible Society, and served for many years as Trea-

surer of the Hamilton Branch. His service to his community was highlighted by the leading role he played in the development of the famous Royal Botanical Gardens and his remarkable record as its President from 1963 to 1973. His high place in the legal profession was recognized in his appointment as one of His Majesty's Counsel, and his election as President of the Hamilton Law Association.

His outstanding career of service in Masonry commenced in 1927 at the age of 27. He was initiated in St. John's Lodge No. 40, and served it as Worshipful Master in 1941, and later as Treasurer for a period of years. In recognition of his devotion and merits he was appointed Grand Senior Deacon of Grand Lodge in 1966.

Only one year after his initiation he joined the Scottish Rite. In 1928 he became a member of Murton Lodge of Perfection, joined Hamilton Sovereign Chapter of Rose Croix in 1937, and in 1940 Moore Sovereign Consistory. He served as Most Wise Sovereign of the Chapter from 1952 to 1954, then as Grand Registrar for many years. He was coroneted an Honorary Inspector-General, 33°, in

1950, and crowned a Sovereign Grand Inspector-General in 1961. In 1964 he was elected Grand Secretary-General and served with great distinction in that position for eleven years until his death in 1975. His wide knowledge, legal training and unfailing readiness to be of service imparted a very rare and special quality to his contribution to the Rite. The Valley of Hamilton has given to Freemasonry and to the Scottish Rite some giants among men; Bert Welby stands for all time with those in the forefront.



Arthur Lawrence Scace, 33°, was born in Brockville in 1900 and raised there. Following his call to the Ontario Bar in 1926 he practised his profession in Toronto throughout the balance of his life, and was appointed Queen's Counsel. He was a devoted Churchman.

He was initiated into Masonry in 1926 in Grenville Lodge No. 629 and was elected its Worshipful Master in 1937. Thereafter he served his Lodge as Treasurer for many years. In 1971 he was honoured by appointment as Grand Senior Deacon of Grand Lodge.

His career in the Scottish Rite commenced in 1946 on joining the Toronto Lodge of Perfection. In 1947 he became a member of Toronto Sovereign Chapter of Rose Croix, and in 1948 Moore Sovereign Consistory in Hamilton. He served the Lodge of Perfection in 1954 as T.P.G.M. In 1956 he was coroneted an Honorary Inspector-General, 33°, and in 1961 was crowned a Sovereign Grand Inspector-General, serving Supreme Council for years as Chairman of the Committee on Jurisprudence and Legislation. He was Grand Chancellor from 1968 to 1972.

Art Scace was a friendly, popular, unselfish, highly respected member of Supreme Council. He responded with enthusiasm and devotion to the challenge to serve the Foundation. Having put his hand to the plough he never turned back.

As this history is being penned in 1984, the twentieth year of the life of the Foundation, all of the above mentioned "Founding Fathers" have been called, some long since, to the Grand Lodge above. Of the originals, only the writer survives, and he alone has been a Director of the Foundation throughout these two entire decades.

Notwithstanding embarrassment, the following biographical note is included, in order that the record for future reference may be complete.



Donald Methuen Fleming, 33°, the youngest of the "Founding Fathers", was born at Exeter, Ontario in 1905, and grew up in Galt. He graduated from the University of Toronto (B.A.) in 1925 as the Governor-General's Gold Medallist. Graduating from the Osgoode Hall Law School in 1928 as Medallist he was called to the Ontario Bar that year and practised in Toronto. He received the earned LL.B. degree from the University of Toronto in 1930. He was created one of His Majesty's Counsel in 1944. He received the degree of D.C.L. from Bishop's University in 1960, and the degree of

LL.D. from Waterloo Lutheran University in 1966, both honoris causa.

Always an active Churchman, he served at various times as Elder, General Superintendent of the Sunday School, Chairman of the Commission on the World Mission of the Church, Chairman of the Congregational Board, and member of the Choir. He was President of the Toronto Y.M.C.A. 1966-68, President of the North Toronto Y.M.C.A. 1944-49, President of the Upper Canada Bible Society 1945-47, Chairman of the Inter-Varsity Christian Fellowship 1939-44, President of the Businessmen's Noonday Bible Club, and other religious organizations.

He served as President of the Canadian Club of Toronto 1964-65, a Governor of the University of Toronto 1964-68, a Senator of the University 1944-48, and remains a Knight Commander of the Military and Hospitaller Order of St. Lazarus of Jerusalem.

For a quarter of a century Don Fleming followed a political career. He was a Trustee of the Toronto Board of Education 1938, Alderman 1939-44, Member of Parliament (Toronto-Eglinton) 1945-63, Minister of Finance 1957-62, Minister of Justice and Attorney-General of Canada 1962-63. He represented Canada at many international conferences. He was Chairman of the Commonwealth Trade and Economic Conference, Montreal in 1958, and Chairman of the Organization for Economic Cooperation and Development (OECD) at Paris 1961 and 1962. From 1957 to 1963 he served as Ca-

nadian Governor of the International Bank, the International Monetary Fund, the International Finance Corporation and The International Development Agency. He was a member of the Canada-U.S. Joint Cabinet Committee on Defence, and Canadian Chairman of the Canada-U.S. Joint Cabinet Committee on Trade and Economic Affairs.

His Masonic career commenced in 1937 when, at the age of 31, he was initiated in Ionic Lodge No. 25. In 1951 he served it as Worshipful Master. He was elected Grand Junior Warden of Grand Lodge in 1955, and a member of the Board of General Purposes 1964-68. In 1980 he received the honorary rank of Junior Grand Warden from the Grand Lodge of Alberta.

He entered the Scottish Rite in 1944, joining the Toronto Lodge of Perfection, which he served as T.P.G.M. in 1953. He joined the Toronto Sovereign Chapter of Rose Croix in 1945, and Moore Sovereign Consistory at Hamilton in 1948. He was coroneted an Honorary Inspector-General, 33°, in 1954, and crowned Sovereign Grand Inspector-General in 1964. He served as Grand Treasurer-General 1965-67, and as Lieutenant Grand Commander 1967-68. He resigned the last named Office in January 1968 and was transferred to Past Active Rank on moving to Nassau, Bahamas, in the course of serving the Bank of Nova Scotia in the Caribbean. While pursuing a very active Masonic career in Nassau, he continued to take a lively interest in Supreme Council, attending all its Meetings, and in Grand Lodge, attending all its Annual Communications but one since 1962.

It is fair to say that of the Members of the organizing Committee selected by Walter H. Gibson, known since as "The Founding Fathers", none could have foreseen the success which was to be achieved by the Foundation in its first 20 years. Nonetheless, all were imbued with a sense of the high importance of the enterprise on which they were embarked, and a strong determination to serve it to the limit of their capacities.

CHAPTER 3

A CHARITABLE FOUNDATION

One of the stated reasons for including me in the Organizing Committee, although I had just become an Active Member of Supreme Council, was that because of my experience in law and taxation, I would be available to advise and assist in relation to incorporation of the Foundation, and in establishing its status as a charity for tax purposes. I was counsel at the time to the Blake law firm in Toronto. I preferred not to undertake the professional task of incorporation myself, but to retain someone less intimately involved in the project than I had become. At an early meeting of the Committee, therefore, I proposed that my associate, James T. Gow, Q.C., should be retained for the purpose. He was not a member of the Rite, but Arthur Scace also knew him personally, and warmly supported my proposal. Jim was accordingly retained, and handled the incorporation throughout. He did it with great professional skill, and to the satisfaction of all members of the Committee. Jim Gow was a senior member of the legal profession. He had recently acted for the incorporators of Massey College of the University of Toronto. The Bylaws of the Foundation were closely modelled on those of Massey College.

I acted in close consultation with Mr. Gow, but at no time on a professional basis. Not a cent of the fee eventually charged by the Blake firm for the service ever accrued to me. Since the instructions emanated from the full Committee, it became necessary for the entire group to consult personally with Mr. Gow as their solicitor. These meetings were held in the comfortable and commodious library of the Blake firm. They invariably drew a full attendance of the Committee. It was in these agreeable surroundings that the decisions were taken on all questions pertaining to the structure, powers and By-laws of the Foundation about to be born.

The first question was whether to seek federal or provincial incorporation. This issue was quickly resolved. Incorporation under provincial (presumably Ontario) legislation offered the advantage of some simplification, but the Committee unanimously took the ground that, Supreme Council being a national organization with members and presumably donors in all provinces, it was unthinkable that the Foundation should be incorporated on anything but a national basis. This was undoubtedly a sound decision, in keeping with the national outlook of a national organization. The next question, however, was not nearly so simple.

It was vital to establish the charitable status of the Foundation from the outset so that donations would be deductible from the income of donors for income tax purposes. There could be no doubt that the purposes and objects of the Foundation were altogether charitable, but the law required that 90% of its income be disbursed each year for charitable purposes. The method chosen was to capitalize all gifts and employ only the income earned therefrom, but to be certain that at least 90% of the latter should be disbursed each year. In the meantime, the donor would receive an acknowledgment which would be treated as entirely deductible for his tax purposes. The capitalization would occur precisely at the moment the gift passed into the possession and ownership of the Foundation without any formal act or resolution on the part of the Board.

Allied to the question of income tax was the kindred question of whether legacies bequeathed to the Foundation would be assured of exemption from estate duty. Three Provinces, Ontario, Quebec and British Columbia, as well as the Federal Government were imposing and collecting estate tax. It was wisely considered desirable to approach all four taxing authorities for assurance that gifts of income and bequests to the Foundation would earn exemption for their donors. Mr. Gow handled the approaches to the Federal and Ontario authorities. I nominated my friend, Renault St. Laurent of Quebec City, son of the former Prime Minister of Canada, to undertake the approach to the Quebec authorities, and Walter Owen, a friend and later an Active Member of Supreme Council, to make the approach to the British Columbia authorities. Both readily undertook the service I requested of them. The quickest and clearest assurance came from the Quebec authorities. By letter dated November 18, 1964 their ruling was couched in these terms: ".... any donations or legacies made to this Foundation will be exempt from Succession Duties". Similar assurances were received in December and January from the other three taxing authorities. A long first step toward our goal had been taken. It remains only to add that Renault St. Laurent and Walter Owen and their law firms declined to charge any fee for the professional services they had so successfully rendered.

But tax legislation and the attitudes of governments can change. The position of the Foundation had been established clearly by interpretation under existing legislation in four jurisdictions, but Jim Gow was leaving nothing to chance. With wisdom and foresight he wrote the gist of our desired tax position into the application for Letters Patent of Incorporation. To our delight no objection was taken at Ottawa to this bold provision. When the Letters Patent were issued they contained this reassuring declaration: "And it is ordained and declared that: (c) except to the extent that any special conditions

attaching thereto may otherwise provide, all gifts, donations, bequests and subscriptions received by the Corporation (i.e., the Foundation) shall all be deemed to be capital to be held permanently by the Corporation for the purpose of gaining or producing income to be used in promoting its objects."

Ontario has since retired from the succession duty field, but the provinces all have enacted income tax legislation, although collection thereof is in most cases delegated to the federal authority. Since the federal definition of taxable income has been almost universally adopted by the provinces, the wisdom of the course followed by the organizing Committee prior to incorporation has been abundantly vindicated.

The objects of the Foundation were defined in words that unmistakably established its charitable nature, namely,

- "(a) to promote, encourage and carry on charitable work within Canada including the relief of poverty and the advancement of education;
 - (b) to make grants for charitable purposes to any educational or other charitable organization which carries on its work solely within Canada;
 - (c) to do all such things as are incidental or conducive to the attainment of the above objects".

The limitation to charity within Canada is in conformity with prevailing legislation; otherwise the language is very broad and very general. Nowhere in the Letters Patent incorporating the Foundation is mental retardation even mentioned. The Foundation from its inception has retained and still retains full freedom to devote its income to the assistance of any charitable cause whatsoever within Canada. The selection of mental retardation and research into its causes was a decision taken at a later date by the Board of Directors, and confirmed by the Members of the Foundation in General Meeting. It was a policy decision deliberately arrived at in exercise of powers plainly conferred by the Letters Patent; nowhere in its instrument of incorporation is such a course dictated. The Foundation, however, has been required to disburse annually at least 90% of its income in promoting, encouraging and carrying on charitable work within Canada.

Some Foundations more recently incorporated have been less successful in clearly establishing an exempt status and position in relation to gifts and bequests.

The choice of the corporate name presented no problem. All Members of the Committee supported the choice of "The Scottish Rite Charitable Foundation of Canada" as the official corporate name, and it was available. It emphasized that the Foundation was to be national in the scope of its operations and outreach, that it was totally charitable in its objects, and that it was sponsored by the Rite. Supreme Council was not going to hide its sponsorship in anonymity. The new light was not going to be hidden under a bushel.

And thus it came about that Letters Patent, dated 10th November, 1964 and recorded by the Secretary of State of Canada on 23rd February, 1965, were issued constituting Walter Hodgins Gibson, Richard Coulton Berkinshaw, Howard Brown Moore, Wilbert George Welby, Arthur Lawrence Scace and Donald Methuen Fleming, and all others who may become Members in the Corporation a body corporate and politic without share capital under the name of The Scottish Rite Charitable Foundation of Canada with all the rights and powers conferred by Part II of the Companies Act (Canada). A new legal person had been created.

CHAPTER 4

CORPORATE STRUCTURE

The Letters Patent, the by-laws, and the Companies Act (Canada) defined the structure, powers and operations of the newly born corporation. The memorandum of agreement anticipating the Letters Patent had been drafted with great care. All who signed that memorandum took part in very thorough discussions of the provisions. Happily, all decisions were unanimous.

Constituted a corporation without share capital, it was composed of members, not shareholders. It was left to the by-laws to define the terms of membership, but the Letters Patent flatly "ordained and declared that the business of the Corporation shall be carried on without pecuniary gain to its members and that any profits or other accretions to the Corporation shall be used in promoting its objects". It was similarly ordained by the Letters Patent that "no member of the Corporation, whether or not he shall be a director, trustee, officer or employee of the Corporation, shall be entitled to any remuneration or compensation save and except repayment of reasonable out-of-pocket expenses incurred by him in the performance of duties undertaken at the request of the Corporation".

The Letters Patent also provided that "the operations of the Corporation may be carried on throughout Canada and elsewhere". No territorial limit has been placed on the exercise of the Foundation's powers.

The head office was fixed by the Letters Patent at the City of Hamilton. It was the view of the organizing Committee that the head office of the Foundation should be located with and in the national office of Supreme Council. So it has remained from the beginning.

The Letters Patent named the same six incorporators, Messrs. Gibson, Berkinshaw, Moore, Welby, Scace and Fleming to be the first Directors of the Corporation. The Letters Patent actually did not specify the future number of members to constitute the Board of Directors, but left it to the by-laws to do so. Similarly, the Letters Patent did not specify the offices, or who should hold them, but left that to the by-laws and elections. In like manner, the fiscal year of the corporation was not defined in the Letters Patent, but in the by-laws. In these various particulars sound and usual corporate practice was followed.

Specific power, among others, was conferred upon the corporation

- "(i) to acquire, accept, solicit or receive by purchase, lease, contract, donation, legacy, gift, grant, bequest or otherwise, money and any kind of real or personal property and to enter into and carry out agreements, contracts and undertakings incidental thereto;
- (ii) to hold, manage, sell or convey any of the real or personal property from time to time owned by the Corporation and to retain any real or personal property in the form in which it may be received by the Corporation for such length of time as the Corporation may determine;
- (iii) to invest and deal with the moneys of the Corporation not immediately required in such manner as may be determined by the directors."

The Foundation was thus clothed with ample powers to undertake and carry out all the purposes for which it was incorporated. It is a tribute to the thoroughness with which the preparatory work was done that, from the date of their issue on February 23, 1965, no occasion has ever arisen to seek amendment or supplementation to the Letters Patent.

The Foundation has never borrowed money, although on occasion it has been temporarily accommodated for very minor sums by Supreme Council. It possesses, however, under the Letters Patent very broad powers to

- "(a) borrow money upon the credit of the Corporation;
 - (b) limit or increase the amount to be borrowed;
 - (c) issue debentures or other securities of the Corporation;
 - (d) pledge or sell such debentures or other securities for such sums and at such prices as may be deemed expedient, and
 - (e) mortgage, hypothecate, charge or pledge all or any of the real and personal property, undertaking and rights of the Corporation to secure any such debentures or other securities or any money borrowed or any other liability of the Corporation".

It is to be emphasized, however, that these powers of borrowing may be exercised by the Board of Directors only when authorized by by-law, duly passed by the Directors and sanctioned by at least two thirds (2/3) of the votes cast at a special general meeting of the members of the corporation duly called for considering the by-law. Such a by-law was duly passed by the Directors and unanimously approved by the members on March 3, 1965.

The most extensive source of the provisions defining the struc-

ture of the Foundation and its functioning is, of course, By-law No. 1, "the general by-law", also enacted by the Directors and unanimously approved by the Members of the Corporation on March 3, 1965. It contains 43 Articles. The Letters Patent refer to it as "the Corporation", the By-laws as "the Foundation".

In addition to the six original Members of the Foundation, membership in the Foundation is extended to all persons who from time to time are Active Members of Supreme Council. They hold their membership in the corporation ex officio. Other persons who are members of the Scottish Rite in Canada may be admitted to either full or honorary membership by the Board of Directors for such period of time as the Directors may determine. Thus, upon ceasing to be an Active Member of Supreme Council, a Member ceases to be a Member of the Corporation but, since September 13, 1965, it has been the invariable practice of the Board of Directors, immediately upon his transfer from Active to Past Active status in Supreme Council, to elect every Past Active Member to life membership in the Corporation.

The size of the Board of Directors received extended consideration by the six incorporators. It was their view that the Board initially should be small in numbers so as to facilitate the holding of frequent meetings. With the same object it was decided that Directors should be resident in the Toronto-Hamilton area. All looked forward, however, to the day when it would become possible and convenient to enlarge the Board and spread representation, thereon to all parts of the country. It was, therefore, and wisely, enacted that "The affairs of the Foundation shall be managed by Directors, the number of whom shall not be less than six and not more than eleven, as the Directors may from time to time determine and, until otherwise determined by the Directors, the number shall be six." Directors were to be elected annually by the Members.

The Officers to be elected by the Directors from among themselves were stipulated to be the President and one or more Vice-Presidents. The Board was also authorized to appoint a Secretary, a Treasurer, and an Assistant Secretary, an Assistant Treasurer, and such other Officers as they may see fit. The duties of each Officer were carefully defined. There has not at any time been more than one Vice-President.

The financial year of the Corporation was fixed by By-law No. 1 to "end on the 30th day of April in each year", but with foresight a rider was added, namely, "unless otherwise ordered by the Directors." In 1978 the Board exercised its power and changed the financial year to end June 30th to correspond with the financial year of Su-

preme Council. The fiscal period ended June 30, 1979, therefore, was of fourteen months' duration.

Power to amend and repeal, as well as to enact, by-laws was conferred on the Directors by Article 43, but subject to a significant condition: "No by-law of the Foundation shall be enforced or acted upon until:

- (a) it has been sanctioned by a majority of the votes cast (except as the Companies Act may require more than a majority) at a meeting of the members duly called for the purpose of sanctioning such by-law, and
- (b) the approval of the Secretary of State has been obtained."

This power was invoked on only one occasion and with respect to the annual election of auditors. Article 29 originally provided that "The Foundation shall at each annual meeting of the Members appoint auditors to hold office until the next annual meeting and the auditors shall be a firm of chartered accountants practicing in the City of Hamilton." For the first fourteen years Mr. A.W. Parish, C.A. of Hamilton was elected "the auditor". Questions having arisen as to whether the election of one person complied with Article 29, it was amended in 1979 to read as follows:- "The members shall at each Annual Meeting appoint as auditors a firm of chartered accountants or an individual chartered accountant to hold office until the next Annual Meeting." This amendment, enacted by the Directors and sanctioned by the Members of the Foundation, was duly approved by the Minister of Consumer and Corporate Affairs (successor to the Secretary of State), and came into effect. Since that time the accounting firm of H.R. Doane and Company, now Doane Raymond, has been elected the Foundation's auditors each year.

Enquiry was made in Ottawa in 1979 as to whether the Minister would agree to the amendment of Article 29 to strike out Clause (b) in order to dispense with the necessity of obtaining the Minister's approval of amendments to the By-laws. The Minister, however, declined on the ground that the stipulation as to his approval was made mandatory by reason of Section 155(2)(c) of the Canada Corporations Act.

The fact that only one amendment of the General By-law No. 1 was found necessary in the first twenty years attests alike to the thoroughness of the work of the organizing committee and the skill of its legal adviser, the late James T. Gow. At its meeting on May 10, 1965 the Board of Directors formally recorded their profound appreciation of the services he had rendered. He had indeed served the Foundation well.

CHAPTER 5

LAUNCHING THE GOOD SHIP

The Letters Patent having been recorded in the Department of the Secretary of State on February 23rd, 1965 and reached Toronto the next week, no time was lost by Mr. Gow and the six incorporators in completing the work of organization. This necessitated first a meeting of the six original Directors named in the Letters Patent, then a special general meeting of the Members, then a further meeting of the Board of Directors. The fact that the two bodies were composed of identically the same persons facilitated the transaction of the business. The meetings were fully attended and held in swift succession on the morning of Wednesday, March 3rd, 1965 in the library of Blake, Cassels and Graydon. For all interested in the Foundation, that became an historic day. It is a remarkable coincidence that I have written this paragraph on March 3rd, 1984.

First, Mr. Gibson was elected President and Mr. Welby as Secretary of the Corporation. Reference was made to the lamented death of Tom Wade. By-laws 1 and 2 were adopted, to come into force when confirmed by the Members. A special general meeting of the latter was called to be held forthwith, and a decision taken to maintain the number of Directors at six. The meeting of Members was presided over by Mr. Gibson. The two By-laws were confirmed, the six original Directors were duly elected, and Mr. A.W. Parish, C.A. was appointed auditor.

The second meeting of Directors immediately followed. The first order of business was to elect Officers, with the following results:-

President Mr. W.H. Gibson
Vice-President Mr. H.B. Moore
Secretary Mr. W.G. Welby
Treasurer Mr. R.C. Berkinshaw

Assistant Secretary and Assistant Treasurer

Mr. R.H. Rutherford

It is to be observed that in all the records of the Corporation Masonic titles and rank are never referred to. Those attending meetings or holding office are referred to as "Mr."

The Board resolved to appoint the Canadian Imperial Bank of Commerce, King and James Street Branch, Hamilton, as the bankers

of the Foundation. They have continued as such throughout these twenty years.

Mr. Berkinshaw as Treasurer informed the Board that the Foundation was about to receive a gift of bonds to an aggregate principal amount of \$100,000 from Supreme Council. Crown Trust Company was appointed Custodian to receive the bonds, and a formal agreement authorized to be executed for this purpose. Crown Trust Company remained Custodian until 1971, when the Foundation's banker took over this responsibility, which it has discharged to the Board's entire satisfaction ever since.

The bonds consisted of three denominations:-

\$ 80,000 Province of Ontario 41/4 % due 1978;

\$ 10,000 Province of British Columbia 3% due 1968;

\$ 10,000 Province of Nova Scotia 3% due 1968.

With this generous donation by Supreme Council the Foundation immediately acquired capital in the amount of \$100,000 par, and was assured of an initial income of \$4,000 per annum to be used for charitable purposes. At least 90% of it, or \$3,600, had to be disbursed in the calendar year 1965.

The original six Directors continued as members of the Board, and all the Officers elected at that first meeting remained in their respective Offices until 1968. Thus, stability and continuity were assured to a remarkable degree in the important formative years.



Mr. Ralph H. Rutherford was the highly respected Executive Secretary of Supreme Council. As the chosen Assistant Secretary and Assistant Treasurer of the Foundation he assumed the day-to-day responsibility for managing the affairs of the Foundation in the Hamilton office of Supreme Council. There he enjoyed the capable assistance of Miss E. Marion Lees until her retirement in January, 1975, and thereafter the efficient assistance of Mrs. Beatrice J. Ferrie. Thanks to the generosity of Supreme Council, the Foundation was provided not only with an initial capital of \$100,000, but with the services of the

staff of Supreme Council and the use of its offices. Never, throughout these twenty years, has the Foundation paid a cent for staff or office accommodation, or out-of-pocket office expenses. Supreme Council also paid all expenses of incorporating the Foundation, amounting to \$2,089.73. In 1974 and 1976 the Board of the Foundation, thinking it had imposed long enough on the generosity of Supreme Council, resolved to pay its out-of-pocket office disbursements, and its share of the staff and office costs. Supreme Council gracefully and generously rejected the proposal. The Foundation thus has always remained in a position to devote virtually its entire gross income, less only auditing, banking, safekeeping expenses, postage, publicity materials, etc., to its chosen charitable objects. Supreme Council has acted toward the Foundation at all times with exemplary generosity and true Masonic charity.

As early as May 10, 1965, at a meeting of the Board attended on invitation by Ill. Bro. George C. Derby, Sovereign Grand Commander and Ill. Bro. Charles H. Cunningham, Lieutenant Grand Commander, the size of the Board came under discussion. Some considered that the six Members concentrated in the Toronto-Hamilton area, while adequate for the organization period, should now be enlarged and made more nationally representative. Bro. Derby was satisfied with the existing size, but Bro. Berkinshaw favoured an immediate enlargement by an additional three Members. Decision on the issue was deferred until September, 1966.

Thought was given to the program of meetings for both the Board and the Members. A meeting of the Board would be held in Toronto at the time of the Annual Communication of Grand Lodge in mid-July, and the Annual Meeting of Members and accompanying Board Meetings would be held during the week of the Annual Meeting of Supreme Council in September. The mid-July meeting was discontinued in later years when persons resident outside Ontario were added to the Board, but the pattern of September Annual Meetings, decided in 1965, has continued without interruption these twenty years.

The need for communication with the members of the Scottish Rite throughout Canada was early recognized. Within the Foundation there was now a sense of readiness for its tasks; Supreme Council had given the Foundation an enthusiastic and most helpful reception, but what about the 30,000 members scattered across Canada? How could they be expected to know of the incorporation of the Foundation, the progress it had made, and its commitment to charity? Yet these were the men to whom the Foundation must look for donations to its capital. The Deputies could be counted on to help in

any way within their power, but they were already bearing a heavy burden of responsibility. Was it fair, and was it realistic to expect them to be the missionaries of the Foundation? The subject was anxiously discussed at Board Meetings; it was also directly raised by the President, Walter Gibson, in his Annual Report. He put forth the idea that each Deputy should appoint a duly qualified member to assist him in publicising and advancing the work of the Foundation. Such a person need not be a Member of Supreme Council, he need not be a Member of the Foundation although, if it would help, he could be elected by the Board to membership in the Foundation. It was also proposed that a pamphlet or some such medium of written communication should be composed for wide distribution. These ideas were destined to haunt the Directors for years.

The subject of accounting was fully discussed in Board Meetings. Fortified by Jim Gow, I emphasized that every cent donated must be capitalized and held permanently, and only the income disbursed. I stressed the imperative necessity of strictly complying with the terms of our Letters Patent and the representations we had made to the tax authorities. These admonitions proved very effective. The rules were accepted and adhered to.

The initial fiscal period was very brief. Ending April 30, 1965, it was hardly worthwhile making up separate accounts for it. Besides Supreme Council's gift of the bonds contributions to capital totalled just \$11,378.09. It was very desirable, however, that an informative reporting be made to the Members at the Annual Meeting to be held September 13th in Montreal, and this was done. Full reports were submitted by the President, the Treasurer and the auditor, with good effect.

Ill.: Bro.: George C. Derby, Sovereign Grand Commander received the Report of Walter Gibson's Committee that its work had been completed; it was accordingly discharged. In his Allocution he announced: "Under the capable chairmanship of Ill.: Bro.: Walter H. Gibson, 33° this Committee has accomplished much during the past year, and The Scottish Rite Charitable Foundation of Canada has been well established to fulfil the purpose for which it was created by this Supreme Council."

He reported gifts made to him for the Foundation as follows:-

Toronto Lodge of Perfection and	
Toronto Sovereign Chapter of Rose Croix	\$ 5,000
Barrie Lodge of Perfection	\$ 100
The Vancouver Bodies	\$5,000

Many contributions in lieu of flowers had been made in memory of Ill: Bro: Clarence McLeod Pitts, former Sovereign Grand commander, who died April 10th, 1965. George Derby hailed from Vancouver, and the Bodies there, in addition to their donation of \$5,000 in 1965, recommended that contributions of equal amount be made also in 1966 and 1967. It was an exemplary way for the Vancouver Bodies to demonstrate their loyalty to their own beloved George Derby.

The Report of the Committee on the General State of the Rite stated its conclusion: "Your Committee considers the establishment of this Foundation as probably the greatest transaction in the history of this Supreme Council." The Report was applauded in Supreme Council and adopted.

Walter Gibson, in gracefully acknowledging all the praise and compliments bestowed upon him and his Committee, observed: "Every Member of the Committee has attended each meeting in spite of the fact that occasionally it was necessary to call a meeting on very short notice."

At the Annual Meeting, which was attended by 25 Members, the Reports were adopted, the six Directors reelected, and Mr. Parish reelected Auditor. At the Board meeting all the officers were returned to office. All the work of preliminary organization was now complete and past. The Foundation was in business — the business of collecting capital gifts, and distributing income to charity. But to what charity, or charities?

CHAPTER 6

CHOOSING A CHARITY

The Foundation has long since become so totally identified with mental retardation that it is well to recall how the link between them was forged. The Letters Patent make no mention whatever of mental retardation. They define the charitable objects to be served by the new corporation in the broadest terms. The by-laws likewise are silent on the subject. The directors were legally unfettered in their choice of a charity or charities, and in a legal sense they so remain.

As we have seen in Chapter 1 Ill.: Bro.: Coulton Berkinshaw in his 1963 allocution had recommended the formation of a Charitable Trust or Benevolent Foundation, and his proposal was endorsed by the Committee on the Allocution and by Supreme Council, but in the various charitable objects which he cited as examples mental retardation does not appear. The first reference to this subject is to be found in the 1963 report of the Special Committee on General Fiscal Policies in the following paragraph: "Your Committee feels that there are and will be Scottish Rite Masons who would like to find the name of the Rite identified with some good, sound, well-administered, well-known, humanitarian work; as an example only, we mention research in juvenile delinquency, or the mental illness of children. Members of this Committee have been impressed with the opportunities for assistance which they present."

Juvenile delinquency and mental illness are largely different fields. Delinquency at the time was attracting so much public attention that it might well have laid a stronger claim to the Foundation's support. In that event the funds available to the Foundation might well have made a very useful contribution to research into delinquency, but its history would have been very different had it done so. Moreover, many other enquiries into juvenile delinquency and its causes and effects were current at the time; the Foundation would not have occupied a virgin field in the sense which it found awaiting cultivation in relation to research into mental retardation. The Committee, however, made a signal contribution to the thinking of Supreme Council by directing its attention to research and to children. Both of these concepts were destined to bear much fruit.

It was the same Committee which in 1964 brought to Supreme Council a considered, direct and specific recommendation that its "support should be given to a specific field of the work of the Cana-

dian Association for Retarded Children, and that Supreme Council's particular segment of their work be research." This monumental proposal was the outcome of extended discussions between III. Bro. Walter Gibson and Dr. G. Allan Roeher, National Executive Director of the Canadian Association for Retarded Children (C.A.R.C.), in which III. Bro. Coulton Berkinshaw and III. Bro. Howard B. Moore had remained in close consultation. The report proceeded: "There can be no question as to need in this field. Great strides are being made and results are encouraging, but when the magnitude, the prevalence, and the incidence of retardation are considered, this recommendation is made with supreme confidence that this field offers an excellent project for Supreme Council."

Adoption of the report with all its recommendations was unanimous. Thus Supreme Council had given the organizers of the Foundation a mandate. Supreme Council would not scatter or fragment the Foundation's support among a multiplicity of good causes, no matter how worthy. It had selected one object which it might largely appropriate and in a real sense adopt. Moreover, to identify its object and to advance the opportunity of adoption it limited the field to research. In addition, the selection of the C.A.R.C. would adequately assure identification of the project with children and thus vastly increase its appeal to donors. The concentration on one object should continue at least "until funds for such purposes enable Supreme Council to support others."

The terms of incorporation were designed to leave the Foundation a free hand to select one or more charities and to vary the selection in later years, but Supreme Council's immediate mandate was clear and bold. The incorporators loyally proceeded to carry it out. The minutes of the early meetings of directors and members are totally silent on the subject, but the Annual Report of the President contains this significant paragraph:

"During the past year as an initial project we have worked very closely with the Canadian Association for Retarded Children in its research program, and a part of the grant of \$5,000 made by Supreme Council to it has been used by the Association for the financing of a Seminar which brought together in Toronto from every Province in Canada, leaders in the field of research in the problem of mental retardation. It is noteworthy that the cost of this seminar was very low because of a very special reduced cost for the accommodation of those attending, and also due to the fact that several of those attending, paid a portion of their own expenses in appreciation of the benefits of this gathering. Dr. G.A.

Roeher, National Executive Director of the Canadian Association for Retarded Children, reports definite advances through their research work, and your Foundation is very happy to have made possible this very useful and productive seminar."

At the meeting of the directors on September 13, 1965, the President reminded the Directors that all funds of the Foundation should be devoted to research.

The Foundation had not sufficient funds of its own to subscribe the initial \$5,000 gift to C.A.R.C. in 1965, but just before the close of the next fiscal year the Board on April 23rd, 1966, resolved that a further sum of \$5,000 out of the Foundation's own funds be forwarded to the C.A.M.R. "to be applied for Research purposes in accordance with the arrangements made between our President and Dr. Roeher." The Foundation was now on its own in providing modest funds to support research into mental retardation. Supreme Council had done all that could be expected of it and more.

Already, however, news of the incorporation of the Foundation and its charitable purposes was beginning to come to the attention of other worthy charitable objects, and some members of the Scottish Rite were inviting support of such objects known to them. At the meeting on April 23rd, 1966, proposals were received to establish an orphanage and to construct a new building for a crippled children's centre. It was not easy for the Board to withhold support for such worthy causes, but it was not in a position to take any action thereon.



Dr. G. Allan Roeher in many ways pioneered research in mental retardation in Canada. He certainly pioneered relations between C.A.M.R. and the Foundation. He served C.A.M.R. as its Executive Vice-President from 1962 to 1979, when he was appointed Visiting Professor of the Faculty of Environmental Studies at York University. He was not a medical doctor, but a Ph.D. in Rehabilitation and Special Education. He had published numerous works and was known internationally, being called into consultation in the United States and the Caribbean. He had given inva-

luable assistance to the Bahamas Association for the Mentally Retarded, which the writer came later to serve for eight years as a direc-

tor and four years as Chairman of the Board. The Association for years operated within lines of activity laid down by Dr. Roeher. Happily he developed an excellent working relationship with Walter Gibson, which proved of immense value to the young Foundation as it took its first tentative steps into an enormous new uncharted domain. Dr. Roeher died in 1984.

None of the Founding Fathers of the Foundation would have laid claim to expertise in the field of mental retardation, but as the years passed and they became more and more involved in the program of research not only did their knowledge expand, but their interest as well. They found they were engaged in no little task, but in an enterprise of ever expanding proportions and keener challenge. The results in these first twenty years have been constructive and rewarding beyond all possible conception in 1964. Yet such is the pace and the fascination of scientific research into a very serious human problem that none can surmise what may be achieved in the next twenty. The selection in 1964 of research into mental retardation as the object of charitable support by the Foundation was by any human standard of measurement providential.

CHAPTER 7

BEGINNINGS OF RESEARCH

Research is a popular word, a product of the scientific age in which we live. It is widely accepted as a practical necessity for industry, particularly in a country like Canada, struggling to advance its technology in a highly competitive world. "Research and Development" have become to such an extent an accepted element in our struggle for industrial success that their abbreviation "R. & D." is understood by most newspaper readers, and governments are expected to offer fiscal inducements to encourage them. The expenditure of enormous sums of money on research is accepted as a fact of life.

Next only to industrial research the public places its hopes in medical research. In the mid-sixties I heard the Dean of Medical Studies of the University of Toronto declare that medical knowledge had expanded in the previous twenty years as much as in all previous ages. Medical research has unlocked such countless secrets that the naive public awaits with impatience the completion of the task of exposing nature's remaining secrets. Such miracles have been wrought already that our expectations have become conditioned to recognize no bounds.

Medical research is by nature infinitely complex. What we rather compendiously, and sometimes rather superficially, call medical science is in fact a whole galaxy of sciences or fields, some more closely related and united than others. No overriding intelligence or authority determines in what fields research shall be favoured over others. The decisions which determine precisely where research effort and research resources shall be applied are made in a free society by many persons, whether in the universities, the professions, industry and governments. Sometimes the decisions are made by a number of participating persons, sometimes by but a handful.

Among the fields of medical science which came late to claim the attention of researchers was mental retardation. In 1964 when Supreme Council made its initial choice in favour of research in mental retardation it can be said without fear of exaggeration that it was choosing to pioneer a relatively new field of human and medical interest. This gave the decision a quality of boldness and far-sightedness. If those who made this fateful choice in 1964 had been looking for quick or spectacular results they ought to have turned elsewhere instead. There were no established programs of research at the highest levels in the field of mental retardation. Had there been such it

would have been much easier for the directors of the Foundation to contribute to them with confidence in the results; in 1965, however, it was necessary to devise and invent the programs which should be aided by the very modest contributions which the Foundation was likely to be in a position to make.

Another factor which played a recurring and not always positive role was the untutored expectation of tangible results. Research, whether pure or applied, can be very intangible, and positive results can be very elusive. Yet researchers are expected to "deliver the goods" and to do so within a time frame. It is not always appreciated that researchers are working in the realm of ideas, playing hunches, seeking leads which are at times but slender threads. When I first came in contact with mining in Canada, the rule-of-thumb expectation was that a viable mine might be developed out of ten serious efforts at discovery and development; in later years and in other lands I learned that one in a hundred might be regarded as an acceptable norm of success. So it must be in other fields of even the most sophisticated research. The path will be strewn with hopes and hypotheses which after due enquiry have been discarded. That does not mean that the efforts expended upon them were necessarily wasted or nugatory; they may have produced useful negative results. Human knowledge does not expand along simple straight lines; research proceeds by irregular routes and by the method of trial and error. The path of research in the field of mental retardation is bound to be strewn with discarded theses and abandoned hopes and preconceptions. The directors of the Foundation had to be schooled in a world in which success is not easy or assured.

The most famous and successful medical researcher in Canada was Sir Frederick Banting. He once warned: "Many people think that research is a supernatural gift of the gods. It is simply an idea from a troubled mind, an inspiration followed by infinitely painstaking work and perspiration."

"Until fairly recently," said Dr. Roeher, "mentally retarded people were neglected and abused, viewed as menaces, objects of ridicule and pity." I myself have known cases in the Bahamas even in the nineteen-seventies where retarded children in a family were beaten constantly. Yet, continued Dr. Roeher, "the possibility of giving birth to a child who will have some kind of learning, emotional or physical disability, slight, mild or severe, is present for all of us. These conditions have no respect for class, race or economic status. It can happen to your grandchildren or mine."

Perhaps the old public attitude toward persons suffering from mental retardation had been in part responsible, but in 1965 there was still a lack of interest and awareness of the problem even in the universities. Insufficient financial resources were available, and consequently research activity was minimal. "Few Canadian students were being encouraged to pursue advanced or specialized studies related to mental retardation and other handicapping conditions, to prepare for future careers in the field" is how Dr. Roeher described the condition which he and Walter Gibson sat down to explore in 1965. With funds so limited that only a very modest beginning at best was possible it must have been a baffling prospect. But they had the good sense and the foresight to make a beginning and to devise a program with long-range objectives and capable of expansion. "Progress depended upon influencing and stimulating the quality and breadth of research and training at the university level," said Dr. Roeher. The Research Awards program, which he and Walter Gibson devised "was aimed at encouraging students to enter into mental retardation research and studies, and to prepare them for the training of future researchers."

This then was the program approved by the six directors for the first full fiscal year of the Foundation ending April 30, 1966, and to support it they authorized a contribution of \$5,000., the first ever made by the Foundation from its own resources. Three Canadian students were selected by an impartial national committee of adjudicators set up by the National Council of the Canadian Association for Retarded Children. They were graduate students ready to do advanced research in the field of mental retardation and were selected on the basis of merit alone. They were:

- (1) Miss Lorraine Boyer of Montreal, attending the University of Montreal, who was working toward her Doctorate in Research Psychology in an Education and Research Centre for the Mentally Retarded;
- (2) Mr. James C. MacDougall, formerly of Ottawa, working toward his Doctorate in Research in mental retardation at McGill University, under the eminent Dr. Sam Rabinovitch of the Department of Psychology, Director of the Learning Clinic; and
- (3) Mr. Raymond C. Caverzan of New Waterford, Nova Scotia, who had just completed his Master's degree at Teachers' College, and planned to work toward his Doctorate in Applied Psychology in the Ontario Institute for Studies and Education. At Columbia University he had been Research Assistant at the Mental Retardation Centre, and he planned to make his career in this field.

It is worthy of note that the first Scholarship or Bursary awarded out of the funds of the Foundation was to a French-Canadian female student to enable her to pursue her studies in a Canadian university. This attitude has characterized all awards, now totalling several hundred, made by the Foundation throughout its first twenty years. All have been made on the basis of merit, and merit alone. No discrimination of any kind, whether positive or negative, has ever been practised or even suggested. It would not have been tolerated.

The scholarships were of the value of \$ 2,500. each. To them the Foundation out of an income of \$ 5,392.20 for the year ended April 30, 1966, contributed \$ 5,000.

Another feature of the awards was that they were open to competition from students in all parts of Canada, that is to say, in all universities from coast to coast. This feature has characterized all awards provided by the Foundation for students throughout the first twenty years of its existence. They have been offered to Canadians in whatever part of Canada they might reside. With increasing numbers of bursaries over the years the directors of the Foundation have been happy to achieve a wide geographical distribution.

Were there any lingering doubts, either in the Board of Directors or Supreme Council, about the choice of research in the field of mental retardation as the sole object to date of the Foundation's bounty? Or was it thought prudent to remind the Canadian Association for Retarded Children that it had no vested interest in the income of the Foundation? Or was it timely or desirable to add a merely factual reminder? In his Annual Report as President to Supreme Council at its 1966 Annual Meeting in Niagara Falls Walter Gibson included this sentence: "Our Letters Patent afford wide scope for Charitable activities, and your Directors will choose each year the charity or charities best suited to the funds we can spend."

In his final Report as President in 1968, Walter Gibson sounded a note of warning: "As our funds grow and our ability to contribute to needy work expands it is possible that we may want to enter additional fields. Suggestions will be welcome. In making suggestions, however, please keep in mind the determination to see that any contributions we make to any organization support activities that reach into every part of Canada. We must avoid doing anything that would justify critics in claiming that we localize our work in any community or province of Canada. The universality of research in Retardation helped lead us into this field."

CHAPTER 8

ENLARGING THE BOARD



G. C. Derby



D. M. Taylor



R. W. Austin



H. R. Doane



B. V. Atkinson

The restriction in the number of directors to six, all residing in the Toronto-Hamilton and Tilsonburg area, had served its purpose. Meetings in the first two years had been frequent, and held on short notice, but the attendance was well nigh perfect. By 1966, however, it was agreed that the time had come to enlarge the Board and to assure wide geographical representation in its membership. On September 12th, the Board exercised its right under the By-Laws to increase the number of directors to eleven, the maximum permissible. At their Annual Meeting also held that day, and attended by thirty-four. the members reelected the former six and added five more, Ill. Bros. Derby, Taylor, Austin, Doane and Atkinson. The first

two were from British Columbia, Roy Austin from Alberta, Harvey Doane from Nova Scotia and Bernard V. Atkinson from Quebec. The national character of the Foundation was now clearly reflected in the Board, and has continued to be so ever since. Ill: Bro: Atkinson was the first Past Active Member of Supreme Council to be elected a director of the Foundation. All the officers were re-elected.

Sovereign Grand Commander George Derby in his 1966 Allocution expressed "deep appreciation to the Directors who have so successfully guided it (the Foundation) from its inception to its present official status." He appealed to all Lodges "to support the Foundation in every way possible and by encouraging contributions by the membership." These sentiments were endorsed by Supreme Council.

It was reported that there had been a good response to the efforts of the directors, the Deputies and the Secretaries of Lodges to make known the Foundation and its charitable purpose, but subscriptions were coming in slowly. After donating \$5,000. to the Canadian Association for Retarded Children for the year 1965-1966 there was little left in the Income account. The Board was exploring every avenue for enlarging the circle of financial supporters. At my suggestion a specialist in public relations was retained to advise the Board. His recommendations, while thoughtful, were considered to be too costly, and action on them was deferred. The Sovereign Grand Commander urged the Deputies to talk of the Foundation "on every possible occasion" and emphasized the desirability of bequests. It was becoming all too clear that the task of building up the capital fund would require prolonged and tenacious effort and since only the income therefrom could be employed for direct support of research in mental retardation or other charitable causes the amounts available for actual disbursement would for a time be disappointingly small. It is little wonder that members at times wondered why the proceeds from all donations must be capitalized and only the income applied for the benefit of charity.

It was hoped and expected that the enlargement of the Board would lead to a pronounced widening of the sources of support for the Foundation. Both personally and in terms of the territories they represented they were bound to lend strength to the cause.

Ill: Bro: George Cleveland Derby, 33° was born in Ontario in 1889, and graduated in Arts from the University of Toronto in 1910. Without delay he headed West to Vancouver and entered business as a manufacturer's agent. He served overseas 1915–1918 with the Seaforth Highlanders, was wounded and invalided back to Cana-

da. He joined the staff of the Department of Pensions and National Health and after World War II the Department of Veterans Affairs. An active Churchman, his national service and his community service were outstanding. For these he was awarded the O.B.E. in 1943. His Masonic career commenced in 1918. In 1935-36 he served as Grand Master of the Grand Lodge of British Columbia and was the first recipient of its "Order of Meritorious Service." He joined the Scottish Rite in 1923, was crowned a Sovereign Grand Inspector-General in 1950. He served as Sovereign Grand Commander 1964-1967. It was eminently fitting that he should bring to the Board of the Foundation both the high prestige of his office and his own personal devotion to its mission. In his farewell allocution in 1967 he said with justifiable pride: "I think I may be pardoned for referring to the very generous donation of the Vancouver Bodies of the Scottish Rite during the three years of my tenure of office, in each of which they have made a donation of \$5,000. for a total of \$15,000. I would like to suggest that the other valleys throughout Canada might give a little greater support to this fund than they have been doing in the past. This, of course, in no way relieves individual members and others of doing so." George Derby was tireless in his support of the Foundation. He served as a director until his death in 1971.

- III. Bro David Monteith Taylor, 33°, a charming Scot, born in Glasgow, migrated to Canada in 1922. His entire business career has been spent in Vancouver in photographic materials. He was initiated into Masonry in 1936, was Worshipful Master in 1955, and Grand Master of the Grand Lodge of British Columbia in 1962. He joined the Scottish Rite in 1947 and served as T.P.G.M. of the Lodge of Perfection in 1961. He was coroneted an Honorary Inspector-General, 33°, in 1964 and crowned a Sovereign Grand Inspector-General in 1965. He served as Deputy for British Columbia from 1965 to 1976. He gave sixteen years of faithful service, from 1966 to 1982, as a director of the Foundation.
- III. Bro. Roy Woodrow Austin, 33°, was destined to prove a formidable addition to the Board. Born in Calgary in 1914, his entire life has been spent there. A businessman, an active Churchman, a leader in business associations, Roy Austin by nature was bound to impart vigour and dedication to any task to which he committed himself. Grand Master of the Grand Lodge of Alberta, T.P.G.M. of the Calgary Lodge of Perfection in 1951, Commander in-Chief of Southalta Consistory in 1961–1962, he was coroneted an Honorary Inspector-General, 33°, in 1958 and crowned a sovereign Grand Inspector-General in 1964. He served as Deputy for Alberta from 1967 to 1979. From his first election to the Board in 1966 he has been an energizing force in the Foundation. Now serving his nineteenth year as a direc-

tor, he was Vice President from 1970 to 1973, and has been President since 1973. His devotion to the Foundation has never flagged; his leadership has been vigorous; and his enthusiasm has been contagious.

III .: Bro .: Harvey Roy Doane, 33°, was born in Halifax in 1910. Apart from two years spent in Saint John, New Brunswick, his entire life has been lived in Halifax, where he became a leading figure in Chartered Accountancy. He served in turn as President of the Institute of Chartered Accountants of Nova Scotia and President of the Canadian Institute of Chartered Accountants. His service to his Church and Province in many endeavours marked him out as one of Nova Scotia's most prominent and useful citizens. He was initiated into Masonry in 1942. Joining the Scottish Rite in 1945, he served as T.P.G.M. of the Halifax Lodge of Perfection. Coroneted an Honorary Inspector-General, 33°, in 1962, he was crowned a Sovereign Grand Inspector-General in 1965. He served as Deputy for Nova Scotia, Prince Edward Island and Newfoundland 1967-1970, Lieutenant Grand Commander 1970-1973 and Sovereign Grand Commander 1973-1976. He gave seventeen years of devoted service to the Foundation as a director, 1966–1983, retiring at his own request and to the deep regret of his colleagues in September, 1983.

Ill .: Bro .: Bernard Veysey Atkinson, 33°, was born in England in 1894, a son of the Manse. He came to Canada at the age of 16 and followed a career in banking and business successively in Winnipeg, Toronto and Montreal. He served overseas in the First World War with the 190th Battalion. He was a very active Churchman, serving as Lay Reader, Warden and Lay Delegate to the Synod. He entered Masonry in Toronto in 1923 and was Grand Master of the Grand Lodge of Ouebec from 1961 to 1963. He joined the Scottish Rite in Montreal in 1930 and served as T.P.G.M. of the Lodge of Perfection 1941-1943 and Most Wise Sovereign of the Chapter of Rose Croix 1949-1951. He was coroneted an Honorary Inspector General, 33°, in 1951 and crowned a Sovereign Grand Inspector General in 1959. He served as Deputy for Quebec 1961-1963. He transferred to Past Active rank in 1963. He served as a director of the Foundation from 1966 until his lamented death in 1971. He was greatly loved and respected by his colleagues.

The members of the Foundation had selected five outstanding and highly qualified men to serve on the Board along with the six Founding Fathers. Now that the directors were scattered all the way from Halifax to Vancouver it would obviously become more difficult to hold mid-year meetings of the Board. The pattern of holding Board meetings and the Annual General Meeting of members in September during the week of the Annual Meeting of Supreme

Council was continued, but no mid-year meetings of the Board, save for assembling a bare quorum each July for the mere purpose of calling the Annual Meeting, were held until April, 1979. No serious thought was given to the formation of an Executive Committee to function between meetings of the Board, but more responsibility was inevitably thrown upon the officers, particularly the President, the Secretary and Ill. Bro. Ralph Rutherford, under whose competent direction the office in Hamilton was functioning smoothly. The resumption of mid-year meetings of the Board in 1979 has proved useful and salutary. They have been held in Hamilton or Toronto to coincide with the mid-year meeting of the Advisory Council, thus economizing on travelling expense.

Eleven has proven to be a reasonably satisfactory number of directors. It has served as an acceptable compromise between ease and economy in the transaction of essential business, on the one hand, and the need to accomodate broad national representation on the other. At times a wish has been expressed that the Board might be further enlarged. This would, however, necessitate an amendment of Article 3 of By-law No. 1, and would require the consent of the Minister of Consumer and Corporate Affairs at Ottawa. The Board itself possesses no remaining power to enlarge itself.

Both old and new directors were concerned that both capital and income growth was slow. The \$5,000. contribution to the Canadian Association for Retarded Children in the fiscal year ended April 30, 1966 had made it possible to provide three scholarships or bursaries for research in mental retardation. The next year the contribution had risen to only \$5,400., which provided two new bursaries for post-graduate research, the recipients again being chosen by a national committee of the Association. The income available to the Foundation was obviously too small to be split up among more than one charity; consequently no more was being heard about adding other charitable objects. Ninety-six per cent of the Foundation's income for the year ended April 30, 1967, had been given to the Association.

All the while the directors were continuing to seek to place the reports and appeal of the Foundation before the rank and file members of the Scottish Rite throughout Canada. How best were they to reach these 30,000 potential sources of support? The bulletin "The Supreme Councillor" afforded an opportunity to bring short bits and pieces of information to members, but it was unlikely to have more than a couple of issues at most per annum. The possibility of an extra issue of the "Councillor", devoted entirely to the Foundation, was considered, but not acted on. A suggestion of an assessment on all members was flatly rejected. Moreover, if the annual report of the

President was too lengthy or too bulky to be generally distributed by Secretaries of the Lodges with their summonses could not a condensation of the report be circulated? Would the Secretaries submit to an increase in the cost of mailing their summonses to local members? The discussion went on and on. Plans were made for a special appeal in 1968. Howard Moore was asked to assume special responsibility for public relations.

Meanwhile Dr. Roeher continued to be encouraging and at times challenging. In a letter read at the 1967 Annual Meeting, he said:

"On behalf of the more than half million retarded persons in Canada which this organization represents, we express our gratitude to the Scottish Rite Charitable Foundation for the donation of \$5400. towards research. These funds will be used to finance Research Career Fellowships for promising post-graduate people whose proven ability in research, and interest in mental retardation research, needs to be supported towards their development of further research experience, skills and knowledge. I should emphasize that research in the field of mental retardation really means research in the whole field of handicapping conditions among children, such as those of cerebral palsy, learning disorders, emotional problems, brain injury, et cetera. This is because many of the mentally retarded have secondary disabilities of the kind just mentioned. Hence, your Scottish Rite Charitable Foundation is serving multiple functions of supporting research programs on behalf of the various crippling and disabling conditions. Unless a core of young post-graduate people can be obtained and attracted to dedicate themselves to research careers in the field of mental retardation and general handicapping, our goals cannot be fulfilled. The support of the Scottish Rite Charitable Foundation is doing just this. This current year we have, as a result of your support, three very promising young people on Scottish Rite Charitable Foundation scholarships. The ultimate breakthroughs in research will result from nurturing of young people along the lines just outlined. It costs about one hundred and twenty-five thousand dollars to maintain a totally dependent mentally retarded person in an institution for life. Consequently, any investment which will ultimately lead to easing the problem will be relatively small compared to the cost of doing nothing about research. Ultimate breakthroughs in research are dependent on encouraging brilliant young people in dedicating their lives in this direction. If we can provide the kind of support that your Foundation Scholarships are now providing, we will gradually build such a task force. The payoff can come early or take many years. There is no quick and easy way. Like a good building, the foundations must be established first and this is what your program is

doing. We will be publicizing nation-wide the Scottish Rite Charitable Foundation Scholarships for research early this Fall in order that the best candidates can be attracted and adjudicated. I will keep you informed of developments. The Scottish Rite Charitable Foundation is rapidly becoming known in educational and research circles, as a result of the publicity and activity."

CHAPTER 9

THE BEGINNING OF CHANGE

The original Board of six directors had remained intact for the first two years; the enlarged Board of Directors remained intact for the next two years. The roster of officers remained intact throughout those four years. Thus stability and continuity were maintained throughout the critical first four years.

But this comfortable situation could not be expected to continue much longer. Some of the most active and most useful directors were advancing in years. The year 1968 saw the beginning of numerous changes which were to come.

Walter Gibson had given the most dedicated leadership in the office of President. He was almost revered by his colleagues, so highly did they respect and esteem him. In 1968 his health began to fail, and he was unable to attend the Annual Meeting in September. His report for the year 1967–1968 was read on his behalf by the Vice-President, Howard B. Moore. The other directors and the members of the Foundation were most reluctant to allow Walter to retire from the Board, but such was the condition of his health that he felt obliged to insist on this course. With the keenest regret his insistent wish was respected and he was not re-elected to the Board at the Annual Meeting. He was, however, unanimously elected Honorary President of the Foundation. He is the only person ever to hold this office. He returned and took part in the meetings in September, 1969. At the Annual Meeting on the 6th a resolution of appreciation of his incalculable service to the Foundation was warmly expressed. unanimously adopted and suitably acknowledged by this good man. It was the last meeting of the Foundation which he ever attended. He died on July 9th, 1970, lamented by all who had the privilege of his friendship. Eloquent tributes were paid to his memory at the meetings in September, 1970.

The Foundation is Walter Gibson's memorial. His contribution to its creation and guidance through the early years was of monumental proportions. The close understanding he built with Dr. Roeher issued in the bursary program and became one of his most significant achievements. He set the tone for the endeavours of the officers, directors and members of the Foundation. All looked up to him. He was their beloved leader.

Walter Gibson's retirement created a vacancy on the Board and in the office of President. Howard Moore, who had been Vice-President for the five years since the outset, was the only person who was considered for the presidency. Nevertheless, out of modesty he was reluctant to accept the office. He professed to be unable to fill the shoes of Walter Gibson. No one else shared these misgivings. Howard had an enormous interest in the Foundation and yielded to the views of his colleagues on the Board. He was elected President on September 11th, 1968, and held the office for five years, a period of great importance in the development of the Foundation's program.

His election as President left a vacancy in the office of Vice President. Arthur Scace was elected thereto, and filled the office with great acceptance for two years until 1970. The other three offices remained unchanged, Bert Welby as Secretary, Coulton Berkinshaw as Treasurer and Ralph Rutherford as Assistant Secretary-Treasurer. Thus all the offices continued to be held by Founding Fathers.

The vacancy on the Board of Directors was filled by the election thereto of the Sovereign Grand Commander, Ill. Bro. Charles Herbert Cunningham. The acceptance of places on the Board by two successive Sovereign Grand Commanders was a resounding testimony to the importance which had been achieved by the Foundation in the estimation of Supreme Council. A precedent, first established in the case of Sovereign Grand Commander Derby, has been followed ever since. The Sovereign Grand Commander in office has been elected to the Board of Directors of the Foundation ever since 1966.



Charlie Cunningham was a very rare and distinguished person. He enjoyed wide popularity and universal esteem. Born in Hamilton in 1889, he graduated from the University of Toronto in 1911 in civil engineering. The remainder of his life was spent in Hamilton, where he engaged in the photographic and art business. A constant Churchman he served as Elder and Chairman of the Board of Management. A leader in community enterprises, he had served as President of the Rotary club and Chairman of the Hamilton Branch of the Navy League of Canada. His career in Ma-

sonry commenced in 1917, and reached brilliant heights. He was Worshipful Master of Temple Lodge No. 324 in 1926, Grand Senior

Deacon of Grand Lodge in 1926, T.P.G.M. of Murton Lodge of Perfection in 1935, Commander-in-Chief of Moore Sovereign Consistory 1943–1945. Many Masonic honours were showered on him. He was coroneted an Honorary Inspector-General, 33°, in 1940 and crowned a Sovereign Grand Inspector-General, 33°, in 1946. He was Deputy for Ontario 1952–1959, Grand Secretary-General 1959–1964, and Lieutenant Grand Commander 1964–1967. His accession to the office of Sovereign Grand Commander in 1967 was eagerly awaited by all members of Supreme Council, including myself.

The following events may not be widely known. In the late spring of 1967 I was approached in Toronto by an informal Nominating Committee, consisting of Sovereign Grand Commander George Derby and Past Sovereign Grand Commander Coulton Berkinshaw. to ask if I would accept the office of Sovereign Grand Commander in September. When I had recovered from my astonishment I asked, "What about Charlie Cunningham?". "This has been discussed with him, and he doesn't want it" was the amazing answer I received. I commented, "This is going to cause great disappointment, particularly to our Brethren in Hamilton." I asked for time to weigh the question. I had held the office of Grand Treasurer-General for the two previous years, but compared with Charlie Cunningham and those who had held the office of Sovereign Grand Commander, my service in Supreme Council was relatively brief. I gave anxious thought to the matter, then informed Brothers Denby and Berkinshaw that for various reasons, though much honoured by their invitation, I must decline. A few days later I announced my candidature for the leadership of my political party, which was holding a National Convention in Toronto at the beginning of September. A short time later I was informed that "the Hamilton boys" had persuaded Charlie that he must accept the office of Sovereign Grand Commander. I was relieved and delighted. It would have been a pity if Charlie's career had not been crowned with the supreme office.

At Winnipeg on September 13th, Charlie was elected Sovereign Grand Commander for the ensuing triennium. Having been unsuccessful in my political quest, and having irrevocably put aside all political aims and ambitions, I was elected Lieutenant Grand Commander. I looked forward to serving three years in that capacity. Little did I realize that the hand of fate was about to intervene and change the course of my life. Just a month after my return to Toronto from Winnipeg, like a bolt from the blue, I was asked by the Chairman of the Bank of Nova Scotia to move to the Bahamas and to become Managing Director of its group of five trust companies in Bahamas, Jamaica, Trinidad, Barbados and Cayman, and General Counsel to the Bank in the same area. It would mean giving up many interests

which were dear to me, but the inducements offered were too great to be rejected, and 1968 saw my wife and myself enter on a new life in a new scene. I agonized over my decision, but in January tendered my resignation as Lieutenant Grand Commander. Ill. Bro. Donald L. Witter was elected in due course to fill the vacancy.

At the Annual Meeting of Supreme Council in September, 1968, I applied for and was granted transfer to Past Active status. The Board of the Foundation conferred on me membership in it, and I was re-elected to the Board of Directors. I had some serious questions in my mind as to whether I should continue on the Board, but yielded to the unanimous wish of my fellow-directors. I have not allowed distance to prevent my attendance at Board meetings in these seventeen following years. It is interesting to reflect that had I not accepted re-election as a director it is most unlikely that I would be penning this history of the Foundation in 1984.

Following his election to the Board on September 11, 1968, Charlie Cunningham gave exemplary service to the Foundation. The entire Board and all officers were re-elected at Halifax in September, 1969. But Charlie Cunningham's service as director was destined to be limited to one year, and as Sovereign Grand Commander to two years. For the return flight to Toronto on September 11th he arrived at the Halifax airport ill and in a wheel chair. I said good-bye to him at the Toronto Airport on our arrival there, expressed the hope that he would quickly shake off his indisposition and my regret that I would not be continuing in office as his Lieutenant Grand Commander. Very earnestly he said to me, "Maybe there's some special service that you will be able to render as a Past Active Member of Supreme Council and as a director of the Foundation." It was our last conversation. He died early the next day. How fitting it was that one so vigorous and devoted should die in harness! "And all the trumpets sounded for him on the other side."

The vacancy thus arising on the Board was not immediately filled, though the ten surviving directors had power to do so. Ill... Bro... Donald L. Witter, however, attended the Board meetings on invitation, as Acting Sovereign Grand Commander.

But the hand of death was not satisfied to have taken Charlie Cunningham. On May 4th, 1970 Coulton Berkinshaw was called to the Grand Lodge Above. He was followed on July 9th by Walter Gibson. Thus the two principal figures in the formation of the Foundation and in guiding it through its early years were removed in quick succession. Feeling tributes were paid to their memory at the Annual Meeting in September.

Coulton Berkinshaw was a giant of a man. He attained eminence in many walks of life, but he never sought to minimize or evade responsibility for any Masonic duty, no matter how routine. His acceptance of the office of Treasurer of the Foundation for six years testifies to the high importance he attached to the Foundation and his willingness to bear his full share of the burden of responsibility for achieving its success. He placed the Foundation's finances on a sound basis. Financial policy in those early years was largely of his creation.

CHAPTER TEN

THE FIRST MILESTONE

Growth in the early years was slow. Both members and valley organizations of the Rite were not nearly as responsive as had been hoped by the zealous brethren who were serving on the Board of Directors. To sustain its support for research in mental retardation the Board had only two sources of revenue: interest earned by the capital investments and donations. As April 30, 1965, followed by less than two months the organization of the Foundation there was little to report for the fiscal period ending that day. As noted in Chapter Six, Supreme Council, rather than the Foundation, supplied the \$5,000 initial contribution to the Canadian Association for Retarded Children to cover the cost of the national seminar on mental retardation. Donations from individuals totalled \$183.50, which was the total income for the short period.

In the year ended April 30, 1966, donations from individuals amounted to only \$3,169.77, averaging little more than 12 cents per member. Donations from Lodges that year, however, reached \$23,250.15. A sum of \$5,000.00 was contributed to the Canadian Association for Retarded Children. At the end of the year capital amounted to \$126,419.92. As this sum included the \$100,000 of bonds donated at the outset by Supreme Council the Foundation in fourteen months had gathered in capital donations of only \$26,419.92. At least it was a modest beginning.

The following year produced no improvement. Donations from individuals increased to \$5,031.89, but donations from Lodges fell off severely to \$6,867. A contribution of \$5,400 was made to the Canadian Association for Retarded Children and the capital at April 30, 1967, had advanced by less than \$12,000 to \$138,318.81.

The following year a special appeal was mounted at a cost of \$1,900. It produced a very gratifying response. Donations from individuals increased fivefold to \$24,616.24 and from Lodges to \$15,710. The contribution to the Canadian Association for Retarded Children was increased to \$7,500, and the capital at April 30, 1968 rose to \$178,645.05. It seemed that progress was being made.

The increase in donations was not maintained in the next year, however. Donations from individuals dropped to \$6,124.75 and from Lodges to \$12,324.02. The contribution to the Canadian Association for Retarded Children was increased to \$9,500, and at April 30, 1969

the capital rose to \$197,083.82. This cumulative total was rising, even if somewhat slowly, as well as the investment income it was producing.

The next was a good year. Donations from individuals though coming from only 1200 persons or 4% of the members of the Rite. reached \$23,947.37 and from Lodges \$12,777.20. The contribution to the Canadian Association for Retarded Children was increased to the record sum of \$11,000, and President Howard B. Moore in his annual report was able to point out with pride that the Foundation had now contributed a total of \$38,400 to the Canadian Association for Retarded Children for research in mental retardation. The donation of \$11,000 made it possible for the Association to award six bursaries known as "Scottish Rite bursaries", and to set aside \$1,500 for some technical teaching equipment. The awards were made by the Association subject to the approval of the President and the Treasurer of the Foundation. Bro. Moore was at pains to stress in his annual report: "I can assure you that we are not "taken for granted", and also that the Scottish Rite Charitable Foundation has always been given appropriate identification in the councils of Retardation. Perhaps I should remind you that the research program in which we are engaged extends its benefits far beyond the area of retardation in children, and that it overlaps into other fields."

Looking ahead to the day when the income available to the Foundation might become substantial he said, "I have no doubt that your Directors will (then) recommend that a portion of it be contributed to other worthy causes, but for the time being a wider distribution would not give appreciable assistance to anybody." This wise counsel prevailed. The full sum of \$11,000 available was contributed to the Canadian Association for Retarded Children "to be expended in research projects to be arranged and approved on behalf of the Foundation by the President and the Treasurer."

At April 30, 1970 the capital had increased to \$234,808.39. When the Treasurer, Coulton Berkinshaw passed to the Grand Lodge above four days later he knew that the Foundation's capital which he had laboured so hard to build up, had reached virtually a quarter of a million dollars.

This large increase in capital had led the directors in September, 1969 to examine their investment policy. They were concerned at the rate at which inflation was eating into the market values of bonds held in the investment portfolio. Interest rates on bonds had risen slightly, but not sufficiently to offset the inroads of inflation. With a now substantial amount of capital to be kept invested anxious thought was given to the whole question of investment policy. On the

direction of the Board Arthur Scace and I drafted a formal statement of policy. It was adopted by the Board, though not unanimously, and confirmed by the members, as follows:

"WHEREAS the capital of the Foundation now exceeds \$200,000; AND WHEREAS investments to date have been restricted to trustee securities, consisting of Government bonds, Government guaranteed bonds and guaranteed trust certificates;

AND WHEREAS the depreciation in the market value of the said securities has called attention to the desirability of modifying the investment policy pursued heretofore:

AND WHEREAS the By-laws of the Foundation authorize the investment of its moneys in any of the investments or in any of the classes of investments in which the Canadian and British Insurance Companies Act permits companies registered under its provisions to invest their funds;

AND WHEREAS it is deemed desirable to broaden the scope of the Foundation's investment policy to include the purchase of equity stocks within the terms of the said By-laws as an offset against further declines in market values of bonds and further erosion in the value of the Canadian dollar;

BE IT RESOLVED THAT:

- (1) An Investment Committee be and is hereby established consisting of the President, the Treasurer and the Secretary;
- (2) The said Committee be and is hereby authorized to invest up to but not exceeding 15% of the total Capital of the Foundation from time to time in equity stocks within the terms of the said By-laws;
- (3) The said Committee is charged with full responsibility and shall have full power to implement the said new investment policy;
- (4) The said Committee is authorized in the course of implementing the said policy to consult investment counsel of its choosing and to incur any expense so involved.
- (5) The said policy shall be submitted to annual review."

In the outcome, however, the power to invest in equity stocks was never exercised. The only stocks ever held by the Foundation were five shares of Bank of Nova Scotia stock which were received as a legacy. The Foundation has been spared the vagaries and anxieties of the stock market.

President Moore in his 1970 Report was at pains to assure members of the efficacy of the program of awarding bursaries. Perhaps he was moved to do so by the questions of some who kept looking for tangible results. In the Report he said:

"Our participation in this priceless work of endeavoring to find the causes of retardation and the means by which the potential of afflicted individuals can be utilized for the benefit of themselves, of parents whose suffering cannot be understood by those who have providentially escaped this cause of anguish and grinding worry and care, and of society as a whole.

The following comment on awardees of our bursaries gives some facts for deep satisfaction. It is not colorful; there is no fanfare or drum beating in connection with it, but I am confident that those who think, and those whose families have been visited by retardation will find encouragement in these histories.

"One early bursary winner now acts as a consultant psychologist to a large metropolitan association for the retarded, assessing the children in the special schools and interpreting their needs for the teachers and others who care for them.

Another is working as a Research fellow at the Institute for Research in Human Abilities in Newfoundland. His special interest is in the slow learners, especially those who are also deaf. A program of testing is under way to identify all the children in Newfoundland who are in need of special training.

Yet another of those early graduates went on to work at the Ontario Institute for Studies and Education, where new special educational techniques and programs are conceived and tested, then made available to all schools in Ontario.

One young man who was supported by Scottish Rite during the final year of his Ph.D. course, has gone on to make a major contribution to the cause of retardation in Alberta. He now holds a joint appointment in Edmonton with the Centre for the study of mental retardation in the Department of Educational Psychology. Part of his time is spent in evaluating the learning processes of mentally retarded children and investigating ways of enhancing these children's learning. He also teaches special education majors who are planning to teach exceptional children in the schools of Alberta and elsewhere in Canada and, with his students, is conducting remedial programs for retarded adolescents, teaching and developing appropriate social and occupational skills.

Of the more recent bursary winners, some have now completed their courses and are accepting appointments — as consultants to work with the children or in some aspect of research into prevention or better training of the retarded — in special education, psychology, genetics and other disciplines concerned with the problem. Those students who have not yet qualified are continuing their studies so that in a year or two they will be able to make full contribution.

Each year the number of applicants has grown. When the most recent series was announced over 50 excellent applications were received from graduates willing to dedicate their careers to the cause of mental retardation. Thus the benefits of The Scottish Rite Bursary program are twofold: many young people have been encouraged to pursue their careers in retardation by the obvious interest and concern expressed by Scottish Rite members through their support. Even the unsuccessful candidates have been made aware of this concern through the awards announcements and the general publicity. The second and more direct benefit to the people we are trying to help — the half million retarded in Canada — has been the improvement in services and techniques brought about by the work of the "Scottish Rite" students. What the Scottish Rite members have done and continue to do is to ensure that many retarded children have the chance of self-fulfillment, not by luck, but as part of their normal learning process, using the knowledge and techniques which our researchers have discovered."

as 1969 Howard Moore began to promote the idea of marking this special milestone by building the Foundation's capital to half a million dollars. This bold proposal required some temerity. Some of Howard's colleagues thought he advanced his proposal "with tongue in cheek", but he returned to the theme in 1970. By then the goal appeared to be more realistic. With \$235,000 in hand by April 30, 1970 was it beyond the resources of Scottish Rite members in Canada to

add another \$265,000 in the next four years? The attitude of the directors was, "Not if we believe in our cause and make it known." Coulton Berkinshaw, with but a few days to live, gave the project his blessing.

Mention had been made by Howard Moore of the fact that our research program "extends its benefits far beyond the area of retardation in children" and "it overlaps into other fields." It seemed realistic, therefore, while stressing study of the causes of mental retardation in children not to concentrate on it to the exclusion of mental retardation in later years. In 1969 the Canadian Association for Retarded Children altered its name to "Canadian Association for the Mentally Retarded." Its example was followed in the Bahamas. The Canadian Association later formed a subsidiary group under the name "National Institute on Mental Retardation" (N.I.M.R.) to act as a funnel for research support and activities. The Foundation's principal contacts have been with N.I.M.R. in recent years.

Progress was made in the fiscal year ended April 30, 1971. Donations by individuals reached a new record of \$34,559.40, while donations by Lodges aggregated \$13,024.11. A contribution of \$15,000 was made to The Canadian Association for the Mentally Retarded. At April 30, 1971 capital stood at \$285,938.22.

The rise in donations from individuals continued the next year, reaching \$39,085.17, while donations by Lodges declined slightly to \$12,802.78. The contributions to N.I.M.R. rose to a record \$19,000. Capital at April 30, 1972 stood at \$340,072.60..

In the following year, donations by individuals leaped upward to a very gratifying \$47,246.03, and those of Lodges to \$14,188.91. The contribution to N.I.M.R. reached the astounding sum of \$25,000. Capital at April 30, 1973, stood at \$403,507.54. The goal of half a million in 1974 was in sight.

The idea of marking the Centennial Year of Supreme Council by a mighty effort to support the Foundation was brilliant, and it caught fire. It was given wide currency in 1973 and 1974. The goal was attained and surpassed, and even after the close of the fiscal year on April 30, 1974, special contributions intended to mark the centennial year continued to flow in. Contributions by individuals reached the undreamt of total of \$82,756.54 and those of lodges \$46,706.03. In addition bequests, which up to that year had been small, leaped to \$56,345.02. Also, the sum of \$49,461.40 was transferred to the Foundation from Memorial Service and Trust Fund. The contribution to N.I.M.R. reached \$30,000. Capital at April 30, 1974 reached \$638,889.03. It was a fabulous achievement. The members of the Scottish Rite throughout Canada had risen to a great challenge.

Even before the triumph of 1974 questions were being raised as to whether the C.A.M.R. and the bursary research program were making the most effective use of our rapidly growing financial support. I took the floor at the Annual Meeting of the Foundation on September 6th, 1972, to resist any diversification or fragmentation of our charity. It was a fact that C.A.M.R. was making excellent use of our annual contribution. In 1972 bursaries were awarded to nine research students from seven provinces.

In his final report as President in September, 1973, Howard Moore delivered this authoritative and valedictory summation:

Since the birth of an idea in the mind of a great Sovereign Grand Commander, Ill. Bro. R. Coulton Berkinshaw, 33°, and a suggestion arising out of the experience of our first President, Ill. Bro. Walter H. Gibson, 33°, and his brilliant wife, The Scottish Rite Charitable Foundation of Canada has developed into an important factor in the field of Mental retardation in Canada.

To give definite indication of the worth of our effort, 47 bursaries have been awarded to young people who have dedicated themselves to the field of research since 1965.

These young folks come from all of the provinces of Canada and have been adjudged of sufficient mentality, education, dedication and financial help to be worthy of an investment in their future.

To indicate achievement by some of these people I quote the following:

Jean-Marie Bouchard (1971) is now Executive Director of the French Canadian National Institute on Mental Retardation in Montreal, and is additionally deeply involved in a research project involving two hundred young educable mentally retarded.

Donald Fields (1969) presently heads the Career Development and Employment Service developed by the National Institute on Mental Retardation and is located in the NIMR building. One of the critical elements in providing innovative and progressive programming for the mentally retarded is in providing the required manpower and utilizing existing leadership potential. CDES provides a national advisory service to both employers and those seeking employment in the field and, therefore, assists in

placing talented people where their services can be best utilized.

Dr. Donald Little (1970) has recently been appointed to a senior faculty post at Acadia University, Wolfville, Nova Scotia. You will probably remember the story of the handicapped child we sent you two years ago. Dr. Little is the person who worked with this little boy. I have enclosed a news clipping which you may find of interest.

Alexander Tymchuk (1969) is currently engaged in teaching and research in special education at a major university. Some indication of the contribution he is making in the field, and his academic achievements as a key lecturer, can be measured by the fact that he was invited to attend a major training course attended by specialists from across Canada, sponsored in August 1972 by the National Institute on Mental Retardation. His topic, and specialist area is that of behaviour modification, a method of managing behaviour in severely disturbed and retarded children.

These are but a few examples of the current activities from the selected cadre of talent who have been fortunate to win support through the generosity of the members of the Scottish Rite.

And incidentally, Dr. Little is the man who wrote the "Kenny Story" which I read to you with some emotional difficulty at a previous meeting.

To indicate to you the care taken in awarding bursaries, I quote the following:

Applications for research bursaries are appointed by a board of adjudicators who are selected by the Professional Advisory Council, (PAC) who provide professional support, guidance and consultative services to NIMR, and represent top expertise in the field. The main criteria for appraisal of research bursary applications can be listed as follows:

1. Quality of research proposal. 2. Relevance of research to mental retardation and children with handicaps. 3. Academic standing of the applicant. 4. Satisfactory affiliation with a University. 5. Financial need. 6. Evidence of commitment, and a future career in mental retardation in Canada.

It is a matter of deep regret that Coulton Berkinshaw and Walter Gibson did not live to see the results of their interest and their planning.

All of this has become possible because of several things:

1. An interest in human welfare and "an idea". 2. Gifts by our brethren, and everyone who has contributed may well be proud of his participation. 3. Leadership in our various Lodges, Chapters and Consistories, and there have been outstanding and productive examples of this great factor from the Sovereign Grand Commander and his eloquent promotion of Foundation during his visits throughout our Jurisdiction. 4. Participation by individual brethren and by Scottish Rite Bodies beyond our Jurisdiction. 5. "Going the extra mile" by our Secretary, our Assistant Secretary and Miss Lees.

To have had a part in all of this has brought rewards far beyond the efforts expended. To all of you and each and every brother who has embraced the opportunity to do something for humanity as a whole and for individuals and families who have been affected by this distressing visitor, I am deeply grateful, and I suggest that it is an unequivocal reply to any who may be inclined to ask — "What is the Scottish Rite doing?"

I believe it only fair to add that our relations with the Canadian Association for the Mentally Retarded and particularly, its Director, Dr. G. Allan Roeher and his staff, as well as the Board of the Association have been characterized by cheerful cooperation and genuine appreciation of what the Foundation has done.

Faithfully yours, HOWARD B. MOORE, President

The new President, Roy Austin, in his first Annual Report in September, 1974, explained the developments in the bursary program in these words:

"This Year we were able to make a contribution of \$30,000.00 to The Canadian Association for the Mentally Retarded. This was apportioned out to 14 Type A Bursaries and 8 Type B Bursaries. To clarify the Types of awards mentioned above —

"The Type A award is offered to qualified students pursuing full time studies at a Canadian University who intend to pursue a future career within the field. The amount varies from \$1,500.00 to \$2,000.00 and the term of the award is for one year.

The Type B award was introduced this year concurrently with the Type A program. The Type B is an extended form of award that offers strictly research and/or study project support. It is designed to attract the most highly qualified student, who will have little problem in securing a basic living stipend, either from the University or other sources. The award will allow the student access to funds strictly for research and study support, therefore providing him or her with distinct advantages in pursuing the selected research program in the most beneficial way. The award covers a term of three years, enabling the National Institute to maintain a close relationship with the recipients, and provide guidance and resource support to insure maximum return in benefits to those for whom we work."

It is expected that this new approach will be a key factor in identifying those who will play future leadership roles in research, program planning and development. It will enable much closer ties to be established between the National Institute on Mental Retardation and those who are recipients of the support made available from the Foundation.

And, characteristically, President Austin closed his report with a challenge: "Brethren, 1973–74 has been a milestone, a dream fulfilled. We are now on our way to the next milestone — \$1,000,000".

CHAPTER 11

THE OLD ORDER CHANGETH

The vacancies on the Board created by the deaths of Charlie Cunningham and Coulton Berkinshaw in 1970 were filled by the election of Donald L. Witter, Sovereign Grand Commander, and Walter H. Mortlock. In like manner the vacancies arising in 1971 on the deaths of George Derby and Bernard Atkinson were filled by the election of Walter C. McDonald and Kenneth R. Nelson. These were worthy replacements for four directors who had given extraordinary service to the Foundation. The Board was re-elected without change in 1972.

We have already noted the shift among the officers in 1970, with Arthur Scace moving from Vice-President to Treasurer to succeed Coulton Berkinshaw, and Roy Austin being elected Vice-President. There were no changes in officers in 1971 or 1972. Arthur Scace's health, however, was failing. He was too ill to attend the Annual Meeting in September, 1972, and his report was read by Ralph Rutherford, as Assistant Secretary-Treasurer. Arthur was re-elected Treasurer in the hope that his health would improve, but he died on April 28, 1973. Again his report was read at the September meetings by Ralph Rutherford. Another of the Founding Fathers had gone to his reward, and his devoted service to the Foundation evoked warm tributes of gratitude and praise. Three of the original directors now remained.

The vacancy on the Board arising upon the death of Arthur Scace was filled at the Annual Meeting by the election of Gordon A. Ferguson. No further change in the Board occurred until 1975.

Howard Moore had for several years declared his determination to retire from the presidency, but each September under pressure was prevailed upon to continue another year. This pattern, however, came to an end in September, 1973 when Howard, after serving the office for five very important years, stepped down. He did, however, accept the office of Treasurer, vacant since the death of Arthur Scace, and filled it for three years, till 1976. Roy Austin succeeded to the presidency, which he has filled with distinction ever since. Walter Mortlock was elected Vice-President and served that office until 1979.

Many glowing tributes were paid to Howard Moore at the meetings in September, 1973. He was invited to address the Supreme

Council Dinner, where he gave a resume of the activities of the Foundation, as well as the hopes and aspirations associated with it. Sovereign Grand Commander Doane in his allocution lauded Howard's service.

Throughout all these years the office at Hamilton had functioned smoothly and efficiently. Year after year warm tributes were paid to Ralph Rutherford, Assistant Secretary-Treasurer, and Miss Marion Lees, and these tributes were resoundingly endorsed by the members. Ralph was elected a member of the Foundation in 1970 as an expression of the confidence and gratitude of the members. He was the first and so far the only Honorary Inspector-General, 33°, to be so honoured. No such honour could be paid to Miss Lees either prior to or on her retirement in January, 1975, but many warm tributes of appreciation and affection were paid both officially and unofficially to this gracious and most competent lady, whose service had always stood out like a beacon light. She was succeeded by Mrs. Beatrice J. Ferrie, a delightful and very conscientious lady totally committed to the service of Supreme Council and the Foundation. In these three exemplary persons the Foundation has been incredibly fortunate.

It is appropriate, even if briefly, to look more closely at the five directors elected in 1970, 1971 and 1973 respectively.



Donald Lloyd Witter was born in Ontario in 1898. He was educated in Toronto and, after 3½ years' service with the Canadian Field Artillery overseas followed a career in banking, which included in its wide scope Ontario, New York, the Caribbean, Central America and finally Montreal. An active Churchman, who had served as Elder and Trustee, a sportsman, for years Chairman of the Board of Governors of the Montreal Unit of the Shriners' Hospital for Crippled Children, he had lived a life of unblemished and unselfish service. He entered Masonry in 1920. He was Grand

Master of the Grand Lodge of Quebec. In the Scottish Rite he served as T.P.G.M. of Hochelaga Grand Lodge of Perfection. In 1953 he was coroneted Honorary Inspector-General, 33°, and crowned a Sovereign Grand Inspector-General in 1961. In 1968 he was elected Puissant Lieutenant Grand Commander. A year later on the sudden demise of Sovereign Grand Commander Charles Cunningham he

succeeded to the duties of Sovereign Grand Commander for a year. In 1970 he was elected to that office and served it till 1973. He served as a director of the Foundation from 1970 to 1980.



Walter Henry Mortlock was born in London, England, in 1908, moving to Canada in 1911. He was educated in Peterborough. He served five years with the Royal Canadian Artillery in World War II, and engaged thereafter in the construction industry. He has always been active. an Churchman and a leader in many community enterprises. He entered Masonry in 1929 and was Worshipful Master of Hastings Lodge, No. 633, in 1941 and of William James Dunlop Lodge, No. 675 in 1954. In Grand Lodge he was District Deputy Grand Master of Peterborough District in

1961 and a member of the Board of General Purposes in 1965. He joined the Scottish Rite in 1941, and served the Peterborough Chapter of Rose Croix as Most Wise Sovereign in 1959. He became a member of Moore Sovereign Consistory in 1961. He was coroneted an Honorary Inspector General in 1963 and crowned an Active Sovereign Grand Inspector-General in 1968. From 1973 to 1976 he was Grand Chancellor, from 1976 to 1979 Lieutenant Grand Commander and from 1979 to 1982 Sovereign Grand Commander. He has served as a director of the Foundation ever since 1970.



Walter Clifton McDonald was the first director to represent the Province of Manitoba. A life long residant of Roland, in that Province, he graduated from the University of Manitoba in 1925, and followed a business career in insurance and real estate. His remarkable record of Church and community service was climaxed by ten years' service in the Manitoba Legislature. He entered Masonry in 1927, was Worshipful Master in 1935, and Grand Master of the Grand Lodge of Manitoba in 1948. He joined the Scottish Rite in 1945 and served as Commander-in-Chief of the Manitoba Sovereign Consistory in 1961. He was coroneted an Honorary Inspector-General, 33°, in 1955 and crowned a Sovereign Grand Inspector-General in 1960. He served as Deputy for Manitoba 1969–1973, as Lieutenant Grand Commander from 1973–1976, and as Sovereign Grand Commander from 1976–1979. He has served as a director of the Foundation ever since 1971.



Kenneth Roberts Nelson was the first director to represent the Province of New Brunswick. A life-long resident of the City of St. John, where he was born in 1900, he engaged in the general insurance business.

He served in the Canadian Army for four years in the Second World War.

He is an active Churchman. He was initiated into Masonry in 1923, was Worshipful Master in 1934, and served several years as an officer of the Grand Lodge of New Brunswick. He joined the Scottish Rite in 1929, and served as T.P.G.M. of Saint John

Lodge of Perfection in 1944 and 1945 and Commander-in-Chief of the Saint John Consistory in 1945.

He was coroneted an Honorary Inspector-General, 33°, in 1957 and crowned a Sovereign Grand Inspector-General in 1961. He served as Deputy for New Brunswick 1961 to 1973. He was a director of the Foundation for eleven years (1971–1982).



Gordon Alexander Ferguson was born in Manitoba in 1899. Interrupted by service overseas in both World Wars, he pursued a business career in Moose Jaw. His service to his church and community was fantastic in variety and extent. He was President of the Saskatchewan Division of the Canadian Red Cross Society, President of the Saskatchewan Council for Crippled Children and Adults, President and later Secretary of the Cancer Society, Founder and President of the Moose Jaw Family Service Association. President of the Saskatchewan Good Roads Association, Past President and Past District Governor of Rotary. He served Moose Jaw as an Alderman for years. It is little wonder that in 1961 he received the Citizen of the Year Award.

His Masonic activities were legion in number. Joining the Order in 1937 he was Worshipful Master in 1948. In the Grand Lodge of Saskatchewan he was District Deputy Grand Master in 1957 and served on the Board of General Purposes for some years.

He joined the Scottish Rite in 1945, serving as T.P.G.M. in 1959 and Most Wise Sovereign in 1960. He was coroneted an Honorary Inspector-General, 33° in 1962 and crowned a Sovereign Grand Inspector-General in 1969. Unfortunately, his death on January 28, 1977 cut short his very fruitful service, begun in 1973, on the Board of the Foundation.

On August 25th, 1975, Bert Welby, after the briefest illness, passed to the Grand Lodge Above. It is difficult to convey in this record the sense of shock which this sudden loss caused throughout Supreme Council and the Scottish Rite in general. From its inception Bert had served the Foundation as a director and as Secretary. His service in that vitally important office was of monumental proportions, as was his service to Supreme Council as Grand Secretary-General. His encyclopedic knowledge, his sound legal mind, and his selfless devotion to his duty gave him a position of authority, honour and respect among his colleagues. His eleven years of service to the Foundation as a director and senior officer deserve the highest recognition and the gratitude of the ages.

Bert's death preceded the Annual Meeting by a mere fortnight. It was necessary to act speedily to meet this totally unexpected emergency. The Secretaryship was one office which could not be allowed to remain vacant, and the incumbent must reside near the Hamilton area.



Fortunately, and to the great relief of all concerned, Wilfrid Nasmith Paterson of Dundas was available and willing to accept the combined positions of Grand Secretary-General of Supreme Council and Director and Secretary of the Foundation. Born in Westmount, P.Q. in 1908, a graduate of McMaster University, a football star with the Hamilton Tiger Football Club when Tigers were Grey Cup champions, and latterly Assistant to the President of McMaster, Wilf Paterson was a very active Churchman and leader in wholesome community activities. He entered Masonry in

1948, was Worshipful Master of Barton Lodge in 1957. He served Grand Lodge as Grand Senior Deacon in 1973. He joined the Scottish Rite in 1955 and was Commander-in-Chief of Moore Sovereign Consistory 1968–1970. He was coroneted an Honorary Inspector General in 1966 and crowned a Sovereign Grand Inspector General in 1973.

The situation into which Wilf Paterson stepped in September, 1975 would have daunted the spirit of most men. He had never attended a meeting of the Foundation and only one or two of Supreme Council. His duties commenced immediately; he was literally thrust into the midst of the Annual Meetings in September, with all the responsibilities which they cast upon the Secretary. With the invaluable assistance of Ralph Rutherford, and the aid of a cheerful disposition, he met all the requirements of the situation. He became a highly esteemed member of the Foundation family, and was re-elected as Director and Secretary in 1976 and 1977. Sadly, his sudden death on September 13th, 1977, brought this remarkable record of service to the Foundation to an early, altogether premature, and deeply lamented end.

But death had not yet done its fell worst. In 1976 Howard Moore insisted on giving up the Treasureship. He had held the offices of Vice-President, President and Treasurer in succession for thirteen years. He remained on the Board, however, and his views continued to be of great advantage to his colleagues. He died on June 6th, 1978, beloved, honoured and lamented by all. He had served for fifteen unbroken years as a Director of the Foundation.

With the death of Howard Moore only the writer has remained of the Founding Fathers. The gaps left by these who have gone were

formidable; that they proved not insurmountable is a tribute to the high competence and sense of commitment of their worthy successors. The Foundation has never retreated; it has known only how to advance.

Howard was succeeded in 1976 as Treasurer by Donald Witter. His place on the Board was filled most appropriately in 1978 by the election of Charles A. Sankey. Gordon Ferguson's place on the Board was filled in 1977 by Patrick Henry Scott Campbell. Wilf Paterson was succeeded as director and Secretary by John Vincent Lawer by appointment by the Board in 1977 and election by the members in 1978.

In September, 1978 Ralph Rutherford retired as Executive Secretary of Supreme Council and was succeeded by John Craig Allan. The office of Assistant Secretary-Treasurer of the Foundation, which had been so capably served by Ralph for fourteen years was thereupon divided. Ralph continued as Assistant Secretary, and John Allan served as Assistant Treasurer until 1982. In that year Ralph Rutherford, after rendering service beyond the call of duty and beyond all praise as an officer for 18 years, retired. In the three following years John Allan has been elected Assistant Secretary and John W. Lowry, Assistant Treasurer.

The same harmony and united endeavour as previously have prevailed in the Hamilton office.



Pat Campbell was born in Victoria, B.C., and was raised and educated there. His business career took him to Regina, where both as Churchman and citizen he has been very active in community service. He entered Masonry in 1945 and became Worshipful Master of St. Andrew's Lodge, No. 49, in 1967. He was an officer of the Grand Lodge of Saskatchewan in 1972-1973. He joined the Scottish Rite in 1958, and served as T.P.G.M. in 1966-67. He was coroneted Honorary Inspector-General, 33°, in 1967, and crowned Sovereign Grand Inspector-General in 1972. He was Deputy

for Saskatchewan 1974–1984. He served as a Director of the Foundation for two years, 1977–1979.

It was in September, 1923 that a studious young freshman arrived to take up residence in South House of the University Residence on Hoskin Avenue in Toronto. An Arts student feeling very exalted in his Third Year, deigned to take notice of the freshman. The paths of the two were destined to cross again in later years, and particularly in the service of the Foundation. The freshman of 1923, Charles Alfred Sankey by name, was also destined to exert a profound influence on the Foundation. I was the other student.



Charlie Sankey was born in Manitoba in 1905 and grew up in Belleville. From Upper Canada College he moved on to the University of Toronto, graduating in 1927 in chemical engineering as medallist of his year. He took his Ph.D. in 1930 at McGill with the aid of scholarships awarded by the National Research Council of Canada. From 1930 until his retirement in 1970 his life was devoted to chemical research, and he rose to the office of Vice-President, Research, with The Ontario Paper Co. Ltd.

He achieved nation-wide prominence as an authority on chemical re-

search and an inventor of technological processes recognized internationally.

He was an eminent member of numerous learned societies, and for some years was Chancellor of Brock University. He has always pursued a keen interest in music, education and community service.

His interest in Freemasonry has been a feature of his distinguished career. He entered the Craft in 1927 just prior to writing his final examinations at Varsity on the eve of graduation. He was Worshipful Master of Perfection Lodge, St. Catherines, in 1950. In Grand Lodge he served as District Deputy Grand Master in 1967 and later as a member of the Board of General Purposes for some years. He joined the Scottish Rite in 1932 and was T.P.G.M. in 1944. He was coroneted an Honorary Inspector-General, 33°, in 1946 and crowned a Sovereign Grand Inspector General in 1973. He served Supreme Council tirelessly in many ways.

The revision of the rituals in recent years has been largely the result of his scholarly labours even after his transfer to Past Active rank in 1980. He has served as a Director of the Foundation since 1978 and Vice-President from 1979 to 1984.



John Vincent Lawer was born in 1929 in Toronto, where his entire life has been spent. A graduate of the University of Toronto and the Osgoode Hall Law School, he was called to the Bar in 1955 and appointed one of Her Majesty's Counsel in 1966. A very active Churchman he is a member of numerous professional political and cultural organizations.

John Lawer comes from a line of devoted Masons. He became a member of the Craft in 1957 and served Wilson Lodge, No. 86, as Worshipful Master in 1968. He was District Secretary in 1972, and was appointed a

Grand Steward of Grand Lodge in 1973. He has taken an active part in Masonic research. He entered the Scottish Rite in 1959, and served both Toronto bodies with great ability from 1963–1965 as Assistant Grand Secretary and Registrar, and from 1965–1974 as Grand Secretary and Registrar.

He was coroneted an Honorary Inspector-General, 33° in 1970, and crowned a Sovereign Grand Inspector-General in 1973. On the death of Wilf Paterson in 1977 he was appointed Grand Secretary-General of Supreme Council and director and Secretary of the Foundation. He continues to serve the Foundation in both capacities. After serving Supreme Council as Grand Secretary-General for five years he became Deputy for Ontario in 1982. He has been a tower of strength on the Board of the Foundation for the past eight years.

With additions of the calibre of such leaders to its Board of Directors the Foundation was gathering fresh strength to meet new and expanding challenges in the eighties.

CHAPTER 12

PROBLEMS OF PROSPERITY

Since the first big milestone, described in Chapter Ten, was triumphantly passed in 1974 the Foundation had not been standing still or resting on its oars. In the fiscal year ended April 30, 1975 it is true that donations from individuals fell back from \$82,756.54 to \$27,977 and those from Lodges from \$46,706.03 to \$18,411.53. That might have been attributed to reaction following the special exertions of the centennial year, but bequests suddenly soared from \$56,345.02 to \$159,717.51. In no year before or since has the total received from bequests challenged that record. The contribution to the Canadian Association for The Mentally Retarded was increased from \$30,000 to \$55,000, and the accumulated capital at April 30, 1975 rose from \$638,889.03 to \$844,995.07.

The following year saw the next goal of one million dollars of capital brought with reach. Cash donations from individuals rose to \$57,726.90, while those from Lodges declined to \$11,559.07. Bequests, which by their nature are an unpredictable source of funds, declined to \$36,142.73, still a very substantial figure. A new source of donations appeared during the year when certain individuals in P.E.I. donated P.E.I. bonds to a value of \$25,185. The contribution to the National Institute on Mental Retardation was increased to \$75,000 and the capital at April 30, 1976 advanced to \$984,468.85.

In his Allocutions as Sovereign Grand Commander and his later reports as Treasurer of the Foundation Donald Witter had expressed disappointment that the number of contributors (4% in 1970, 7.3% in 1971, 7% in 1972, 8% in 1973) was so low a proportion of the total Scottish Rite membership. In the following years, however, the increase in aggregate donations was very gratifying.

The fiscal year ended April 30, 1977, saw the Foundation not only attain the goals of one million dollars of capital, but far exceed it. Donations from individuals rose to \$59,263.62, while those from Lodges declined to \$9,916.23. Bequests produced no less than \$104,017.32. The contribution to C.A.M.R. rose to \$85,000. At April 30, 1977, the capital stood at \$1,154,877.05.

Total donations were showing wide variations from year to year. In the fiscal year ended April 30, 1978, donations from individuals declined to \$20,798.62, while those from Lodges increased slightly to \$10,443.10, and bequests held up well at \$76,356.42. With the benefit

of income earned on a growing capital total the contribution to C.A.M.R. crossed the \$100,000 line and reached \$110,000. At April 30, 1978 capital stood at \$1,265,151.66.

The next year the fiscal year was changed to end on June 30, instead of April 30, to conform with the year-end of Supreme Council. The fiscal period on this one occasion, therefore, extended to four-teen months. Accordingly, donations by individuals rose to \$32,045, and those by Lodges to \$14,212. Bequests, however, fell off to \$37,013. The contribution to C.A.M.R. rose to the fantastic sum of \$135,000. At June 30, 1979, capital stood at \$1,338,442.

In the twelve-month fiscal period ended June 30, 1980, donations from individuals rose to \$44,719, while those from Lodges were but little changed at \$13,965, and bequests dropped to \$15,583. The contribution to C.A.M.R. was \$130,000, a reduction of \$5,000 from the previous period (fourteen months). At June 30, 1980, capital stood at \$1,412,689.

Donald Witter retiring from the office of Treasurer and as Director in mid-1980 could contemplate astronomic increases in financial support and capital in the four years he had held the office. Growth had been extraordinary.

But the rapid expansion in the financial sources and resources of the Foundation had opened up major problems; and these could be neither ignored nor side-stepped. They were, broadly speaking, two in number, and they were quite distinct. The first was the old question as to whether the Foundation should continue to contribute all of its income to C.A.M.R. The annual contribution had increased in five years from \$30,000. to \$135,000. Was C.A.M.R. capable of putting so much money to the best possible use? Was it likely to suffer from indigestion in its attempted use of so many dollars? Could the bursary program be expanded without diluting the quality of the research it was engineering? Was the Foundation encouraging an unhealthy attitude of dependence on it upon the part of C.A.M.R.? While still committed to research into mental retardation should the Foundation not be looking further afield for some additional channel or channels for the support of such research? At least, was the fund annually available not now large enough to warrant use of part of it, and perhaps a generous part, to support other charities equally worthy of the Foundation's benevolence? Such questions kept arising, and these were being asked seriously. Moreover, they were not confined to sources outside the Board of Directors. Perhaps they had been too long suppressed. It appeared that several Directors might be yielding to doubts about the efficacy of our program. These questions were, of course, known to Dr. Roeher and other officials of C.A.M.R.

Part of the difficulty was due to a lack of information, which in turn was attributable to inadequate communication. C.A.M.R. had a wealth of information which it was anxious to impart, but it was reaching only a few directors when it urgently needed to be shared more widely. Several measures of the highest value were taken with this object in view. The first was a speech delivered September 10th. 1976 in Regina at a luncheon following the Annual Meeting by Donald K. MacPherson, former National President of C.A.M.R. It was an inspiring address, and it was filled with badly needed information. It lauded the accomplishments of the bursary program of the Foundation, now totalling 162 bursaries to date, divided into three categories, Types A, B and C. Mr. MacPherson startled his audience by declaring: "To this point of time I believe that scientists have identified some 200 causes of mental retardation and developmental handicaps. but they have found solutions to only about half a dozen of these causes." This speech created such an impact that President Austin circulated copies widely. Because of its high importance it is included as an Appendix to this volume.

This masterly presentation was followed up the next year with an address delivered at Halifax by Dr. Roeher himself to a meeting sponsored by the Foundation on November 26th, 1977. Dr. Roeher, who knew more about the subject than anyone else, eulogized the accomplishments of the bursary program as "unique" because the Foundation was still the only organization fo support graduate research in this way. Of the Foundation's selection of this research enterprise he said: "The decision was a momentous and courageous one, for it is undoubtedly easier to appeal for funds for a visible need such as that presented by an individual child, a local service or program. However, it takes vision and foresight to recognize that a long-term investment is the only ultimately effective means to get at the real issues which face the handicapped."

Dr. Roeher's speech was a timely and most effective contribution to the information of supporters of the Foundation's effort. Its great importance justifies its inclusion in the Appendix to this Volume. It was Dr. Roeher's final presentation of the achievements of the bursary program. He retired in 1979 as Executive Vice-President of C.A.M.R.



His successor was **Dr. Alfred H. Neufeldt,** who bore the title of Director of the National Institute on Mental Retardation, and who attended and addressed the members of the Foundation at their Annual Meeting in 1979, making very effective use of a film. In view of discussions then proceeding this proved a very timely and useful meeting. It emphasized the ever harmonious relations prevailing between the Foundation and C.A.M.R. The attitude of the C.A.M.R. was totally co-operative.

In 1978 a suggestion was placed before the directors to employ part of

our available funds each year to aid the blind-deaf. It was said by a prominent member of Supreme Council that the proposal was sponsored by the Canadian National Institute for the Blind, a most worthy organization. The directors opposed the proposal and so reported to the Annual Meeting, and nothing further was heard of it. The Board again voted to authorize distribution of all available funds for the current fiscal period to C.A.M.R. How long would this practice continue?

One thing the Foundation could not lawfully do. It could not accumulate the income in its own hands. The law required it each year to distribute at least 90% of all available income for charitable purposes. Whether for C.A.M.R. or some other cause or causes the Foundation must actually part with 90% or more in the year it was received.

The other question was one in which I became somewhat involved personally and somewhat critically. I did not altogether approve the investment policy being followed by the Investment Committee. Our capital exceeded a million dollars. It must be kept invested to the best possible advantage. How was this to be measured? The Investment Committee in 1978 proposed that purchases of bonds be divided between those for income growth and those providing for capital growth. The latter would have meant purchasing deep discount bonds. The Committee also aimed to mature 1/25 of issues in the portfolio annually. This assumed buying bonds with a term to maturity of 25 years. To me it was seriously erroneous to commit all our purchases to long maturities. I considered moreover that we should aim to diversify our purchases in terms of matu-

rity. I considered also that we were loading up our portfolio with too many commercial and industrial issues and that we should be including more government issues and these should be diversified among the various levels of government. In September, 1977 the Board adopted my amendment in favour of diversification, both as to issues and as to maturities. Had this principle been adopted earlier, our portfolio would have been in a much stronger position to withstand the market strains of 1982.

CHAPTER 13

AT THE CROSSROADS

When Dr. Roeher delivered his powerful address in Halifax on November 26th, 1977, the Bursary program had been current for eleven years. He was able to say of it, "From modest and small beginnings the Scottish Rite efforts had made one of the most remarkable contributions in the annals of our history of voluntary effort The Bursary program was initiated at a time of critical need in the field of human services in Canada — when few Canadian students were being encouraged to pursue advanced or specialized studies related to mental retardation and other handicapping conditions — to prepare for future careers in the field. Insufficient financial resources, a lack of interest and awareness of the problem in the universities, and minimal research activity contributed to the situation." Measuring the results achieved since 1966 he concluded, "In comparison with eleven years ago the quality and breadth of research and training in universities in Canada has vastly improved, primarily due to the growing number of Scottish Rite Bursary recipients. . . The Research and Awards program has built the foundation for mental retardation research in Canada. The impact of your efforts has been truly remarkable — primarily because your resources have been concentrated in a field which affects thousands of Canadians and at least one million children. You will leave a monument to society which will never fade."

This was indeed a prized and gratifying testimonial. The lessons were there for all to apprehend. The Foundation had exercised wisdom in the selection of mental retardation as a field of research; it was but little explored, indeed was almost a virgin field when the Foundation chose it. Second, the Foundation had concentrated its entire resources on this one object, and had thereby escaped the pitfalls of fragmentation. Third, the field had thus far been left almost exclusively to the Foundation. Fourth, the Bursary program was an essential foundation for any future program of research in mental retardation in Canada.

Had that foundation by now been sufficiently laid? Had the time arrived when, particularly in view of the increase in financial support available, some other and more advanced form of research might be inaugurated to advantage? Had the Bursary program done its essential work or at least such a part of it as to call for a total reappraisal of the eleven-year-old effort? These questions were stirring in the

Board of Directors. No clear alternative or solution took shape immediately, but some idea whose time had come seemed bound to emerge. The election of Charles Sankey to the Board in September, 1978, coincided with an incipient restlessness. All directors recognized that the field of mental retardation was by no means exhausted; it needed our best efforts, and these efforts seemed bound to lead us into more advanced research programs. Should the Foundation assist in the creation or support of a chair in some Canadian university, or should it sponsor a visit to Canada by some recognized world authority, such as Professor Allan Clarke of Hull University, England, as Visiting Professor to selected Canadian universities with a view to stimulating their launching research efforts? These questions were asked and discussed in Board meetings.

Fortunately, the changing mood of the Board did not turn against the Bursary program. All accepted the idea that it must continue, though perhaps in altered form, e.g., by dropping Type T awards, but that a better accounting of its results year by year should be maintained. This had been left entirely to The Canadian Association on Mental Retardation. No ready index was available of the Bursary awardees from the outset, nor a record of what their Bursary studies had contributed either to research knowledge in Canada, or to the moulding of their careers, hopefully in the field of mental retardation. This then should be the starting point. It was important to learn precisely what former and present recipients were doing.

Dr. Neufeldt was readily responsive to the President's request. His letter dated March 28, 1979 led to the calling of a special meeting of the directors on April 21st, 1979 at Hamilton. It was attended by only seven directors, but the discussion was very thorough, and out of it emerged a three-fold decision:-

- (1) While continuing in the year ending June 30, 1979 to pay over to The Canadian Association on Mental Retardation not less than ninety per cent of the Foundation's income for the period, the Association be informed that, in view of the Foundation's growing income, a larger program of research was required, as well as a more active participation on the part of the Board of Directors in the selection of award winners and subjects for research;
- (2) Prior to the Annual Meeting in September study be given to the most effective use of income resources of the Foundation with a view to submitting a report thereon to the Annual Meeting; and
- (3) Advice be sought from qualified sources, including professional, as may be approved by the President and Treasurer, as to the most effective use of the income resources of the Foundation in future years.

This led to three most significant steps, marked by the readiest co-operation on the part of Dr. Neufeldt:-

- (a) The Canadian Association on Mental Retardation set in train a follow-up of Bursary recipients;
- (b) A major conference was held on August 29th, and
- (c) Dr. Neufeldt met with the full Board in September. He also attended and addressed the Annual Meeting, with the aid of a moving picture, entitled "Sharing the Experience with Peter," with excellent results.

The importance of these events demands fuller treatment.

The follow-up of Bursary Winners was initially limited to the years 1971 to 1978, covering 161 bursaries divided into Types A, B and C. Type A awards were offered to students registered in graduate studies at a Canadian university and planning a career either directly in mental retardation or an associated professional field. The award offered one year of financial support, ranging up to \$6,000., plus one week of orientation at the National Institute on Mental Retardation (N.I.M.R.). Type B was a research-study supplement of up to \$1,000 per year for two years, with an optional third year available if necessary. Type C was a travel-study award covering travel costs and tuition for students and professionals in the field of mental retardation to attend training events and visit research centres and programs relating to mental retardation. Amounts awarded ranged up to \$750.

The purpose of the study of bursary recipients was to identify the usefulness of the award as perceived by them and to determine if the award had had an effect on their subsequent careers, as well as to indicate the amount of research and study being generated by the recipients. The results, while not complete, abundantly vindicated the program. The awards had obviously been most helpful and had advanced the orientation of the recipients toward mental retardation. Some urged more publicity and an increase in amount. The winners were widely distributed across Canada, and they had produced numerous publications. Warm gratitude was expressed to the Foundation for providing the awards. The directors were favourably impressed by these results as regards Types A and B, less by Type C.

The conference held on August 29th was notable in many respects. It was arranged by Dr. Neufeldt at the offices of The Canadian Association on Mental Retardation on the grounds of York University. Eight persons attended. Dr. Neufeldt and Mrs. Ioannou represented the National Institute on Mental Retardation, and three eminent source personnel were present by invitation. They were Dr.

Joe Berg, Professor of Psychiatry and Associate Professor of Medical Genetics, University of Toronto, Dr. Gunnar Dybwad, President of the International League of Societies for the Mentally Handicapped, and Professor and Head of Mental Retardation Research and Training program at Brandeis University, and Dr. Roeher. The Foundation was represented by Walter Mortlock, Vice-President, Charles Sankey and myself. The meeting lasted half a day, the atmosphere was at all times cordial and the results highly constructive. Indeed, this conference ranks as one of supreme importance in the history of the Foundation's program of research. The official minutes are as follows:-

"1. Background

Mr. Fleming and Dr. Roeher noted the history of the Scottish Rite Awards. In brief, the following observations were made:

- at the Annual Meeting of the Scottish Rite Foundation in 1964, it was decided that the Foundation make a charitable effort by supporting research in the field of mental retardation.
- funds were made available for bursaries in graduate research and the first awards were made in 1966.
- because there was some uncertainty as to the amount of funding available, great care was taken in earlier years as to size of awards. In this manner a cushion was gradually built up so that a constant annual sum could be allocated for bursaries on an annual basis, even if there was fluctuation downwards in amount of money available.

2. Considerations leading to meeting

- both the Scottish Rite Foundation and NIMR felt it necessary to review the success of the awards made over the past and to determine what happened to former bursary winners.
- it was also felt that a closer look was needed at the awards program itself and the kinds of research that had been carried out.
- another concern was to determine how best to use the growing funds made available by the Foundation.

3. Award program developments to date

- in order to determine the success of the awards as well as the status and whereabouts of former winners, a survey is being carried out by NIMR. To date 43 former winners have responded (preliminary report is attached).
 - of the former winners who have responded, most are university faculty members and are pursuing research to various degrees, thus illustrating that the purpose of the bursaries is being fulfilled.
 - all people responding to the survey felt that the award was a great incentive for them to continue in the field. A number commented that the Scottish Rite Foundation has gained good recognition in universities as a sponsor of research into mental retardation and that no other group was involved in this kind of support.
- The question was raised as to how research papers by former winners become available to others. It was noted that all research papers become part of the holdings of the National Reference Service of the John Orr Foster Library at NIMR through which they can be widely circulated by inter-library loan. As well, research is noted in the journal Mental Retardation. Researchers are expected to publish in professional journals. It was also noted that bursary winners themselves have the opportunity to meet and exchange ideas at the weeklong annual Orientation course held at NIMR in the summer
- Dr. Dybwad observed that the NIMR Reference Library is the best of its kind in North America. As such, he would encourage young faculty members to spend periods of several months at NIMR to undertake library work, noting that he and Dr. Rosemary Dybwad like to come as often as possible for periods of time.

4. Research approaches

There was some discussion around the issue of research and ways of approaching it

— Questions raised included the following:

- should research be directed to the "cause" or the treatment of mental retardation?
- how can cause and treatment be defined?
- Mr. Fleming noted that to his recollection "research" had been broadly defined and that there had been no specification as to whether it should focus on cause or treatment. Dr. Sankey felt that it would be difficult to distinguish except at the extreme ends.
- Drs. Berg and Dybwad observed that in many cases one cannot distinguish between cause and treatment and therefore to attempt to find one to the exclusion of the other could be difficult.
- In correspondence Dr. Allan Clarke suggested an even approach to both cause and treatment.

5. Best use of resources for bursary needs and beyond

- some questions raised during the discussion of best resource uses included the following:
 - would funds be put to good use in developing, for example, a hospital unit or a university faculty on mental retardation?
 - what would be the best way of investing resources in order to get maximum payoff?
- Dr. Berg noted that the amount of funds presently offered by the Foundation would be rather small to support new ventures such as the establishment of a hospital or a faculty since these are exceedingly expensive. A better approach would be to further existing programs by sponsoring individuals.
- Dr. Roeher suggested that the "multiplier" approach be used; that is, the concept of investing in promising young university members who have an effect on other faculty members and students. This method produces a larger payoff by increasing chances of success since many more people are reached.
- The consensus reached by the group was that the following adjustments and additions be made to the Award program:

Continuing Awards

- Type A the total number of these might be reduced by applying more strict criteria and the maximum amount be raised to \$7,500 per year from the current \$6,000 per year.
- Type B to be available to individuals already supported for research in the field of mental retardation but needing supplemental help.
 - maximum amount to be raised to \$2,000 per year from the current \$1,000 per year.
- Type C to be available to committed persons in the field who require a short term course of study or visit
 - to include travel and tuition up to \$1,000 from the current \$750.

Recommended new awards

- Type D to be made available to a promising young faculty member developing a research program in mental retardation.
 - to last from 2 to 6 months and to include funds in lieu of salary and travel expenses.
 - would need to make available about \$2,000 per month, for salary, with amount of award ranging from \$5,000 to \$15,000.
- Type E to be made available to a distinguished scholar in the field who is able to spend a year developing a program.
 - could take place during a scholar's sabbatical leave.
 - amount would be up to \$50,000 per year and would probably involve 1 recipient every two to three years.

Future possibilities

Type F

- to be made available to an individual with a commitment from a university and in the process of establishing a new graduate program and with the same provisions as Type E.
- funding would run for up to 5 years.

Type C

— to be made available as a recognition of research excellence to an established research unit for major and innovative research work.

Selection process

Type A, B and D— to be adjudicated by external committee advising NIMR of award allocation. A sub-group of the Scottish Rite Charitable Foundation and NIMR would review each year's decisions as part of setting priorities for succeeding years.

Type F — to be adjudicated by external experts with Scottish Rite and NIMR participating

Type G — since the sums involved in this award are small therefore it is suggested that the ratification of award made by the Director, NIMR, with advice from external references.

6. Other

- All members present agreed that CAMR is the best channel for the use of Foundation funds since it represents the interests of all mentally retarded persons in Canada and to divide the funds among other organizations would create fragmentation and would be ineffective.
- an official pronouncement to this effect is to be made by the CAMR president and endorsed by Drs.
 Berg and Dybwad for Foundation members.
- also, a refined description of existing awards as well as new categories is to be sent to Foundation Directors for approval.

AN APPROACH TO SUPPORTING RESEARCH DEVELOP-MENT INTO THE CAUSES, REDUCTION AND PREVEN-TION OF MENTAL RETARDATION VIA SCOTTISH RITE/CAMR INITIATIVES

Year 1	Year 2	Year 3
52,500	52,500	52,500
40,000	60,000*	60,000
8,000	8,000	8,000
15,000	(x2)30,000	(x3)45,000
50,000		50,000
165,500	150,500	215,500
35,000	25,000	25,000
130,500	125,500	190,500 ''
	52,500 40,000 8,000 15,000 50,000 165,500 35,000	52,500 52,500 40,000 60,000* 8,000 8,000 15,000 (x2)30,000 50,000 165,500 150,500 35,000 25,000

^{*}The increase from Year 1 takes into consideration continuing commitments for support of second year studies.

A full report on the conference was made to the Board at its meeting on September 11th, 1979, not only by the three directors but by Dr. Neufeldt, who was present, as well. In also addressing the Annual Meeting the minutes record his remarks:- "Some four thousand persons in Canada are still institutionalized, at an annual cost of some \$30,000. each. Experience gained through working with persons. . . has led to two recent breakthroughs. Firstly, it has been discovered that teaching provided early enough in life can lessen the extent of retardation, — a principle which indeed can revolutionize methods of teaching all children. Secondly, prenatal tests are now being conducted to determine if a foetus has sustained damage to its central nervous system. Such tests can raise wider social and moral questions such as the meaning of birth, tinkering with genes and abortion." Dr. Neufeldt's presentation made a profound impression upon the forty six members of the Foundation present. Only the 1976 Annual Meeting had drawn as large an attendance. Members obviously were impressed with the instructive presentation at first hand which they had received. On the recommendation of the President the usual resolution to authorize the President and Treasurer to distribute at least ninety per cent of the Foundation's income to the Canadian Association on Mental Retardation for purposes approved by them was not passed by the directors. With changes pending he counselled delay until a mid-year meeting of the Board was held. This was in keeping with the very careful approach of the directors at all stages to the changes under study in the Foundation's program.

The September meetings saw several important changes in personnel. Pat Campbell retired from the Board and was succeeded by Lyle H. Bergstrom, who was elected Lieutenant Grand Commander the same month. Walter H. Mortlock retired from the Vice-Presidency of the Foundation on taking office as Sovereign Grand Commander. Happily, however, he remained on the Board. He was succeeded in the office of Vice-President by Charles Sankey, who was exerting a rapidly growing influence on decisions of the directors in relation to research in mental retardation. The directors were fortunate to be able to draw on the extraordinary life-long experience of Dr. Sankey in research and the authority which that experience imparted to his views. These factors were matched by Dr. Sankey's willingness to give assistance without stint to the Foundation's role in research in mental retardation. He then stood on the threshold of what was soon to prove an utterly unique contribution to what was coming to be regarded as the sacred mission of the Foundation.

As early as 1977, before he was elected a director, I had sought to obtain the benefit of Dr. Sankey's experience in research to assist the Board in weighing some of the problems facing it. President Austin and I held a meeting with him for this purpose. His expressions were strong and helpful. He opposed the idea of establishing a chair at a university on the grounds that the cost might exceed our financial resources and that the effort would be localized in only one university, whereas we should be seeking to stimulate research in all universities. Dr. Allan Clarke of Hull in correspondence with Dr. Neufeldt had already sounded the same warning as to cost of establishing a university chair. Dr. Sankey took a mere favourable view of the results which might be expected from the selection of a visiting professor to be available to visit all Canadian universities and to stimulate and fructify programs of research related to mental retardation.

We had to wait till September, 1978, for Charlie's appointment as a director, but his presence on the Board was immediately felt. If more advanced levels of research in mental retardation were to be found it would be necessary to seek them out in universities and hospitals. At a meeting of the Board on April 19, 1980, the entire ques-

tion was thoroughly discussed. Dr. Sankey had already conferred with Dr. Neufeldt and suggested changes in the wording of the awards' notices and these had been accepted. He was now given a mandate by the Board to reject such bursaries as he considered did not meet the Foundation's criteria. A program submitted by Dr. Neufeldt was approved in part and disapproved as to the balance. A decision of far-reaching importance was then taken to request Dr. Sankey to investigate research projects based on universities and hospitals and to visit them in person. This he was willing to do. Since his report would not be available until the next fiscal year it was resolved as in previous years to pay at least ninety per cent of the current year's income to the National Institute on Mental Retardation.

The directors had taken a far more important resolve than they realized. They had taken a decisive step to open doors all across Canada, and to appraise the state of research programs in high places. Fortunately, for this essential task the right man was available. As Winston Churchill commented in sending Field Marshal Alexander to breast a whole new campaign at a critical juncture in World War II, "I could not send an army, but I could send a man." The Board sent a man, with the full co-operation of the National Institute on Mental Retardation. The results were to reshape the Foundation's entire effort to serve a noble cause.

CHAPTER 14

PHASE TWO OF RESEARCH

In accordance with the Board's decision, Charlie Sankey visited six research centres, at Halifax, Montreal, Calgary, Vancouver, Victoria, and initiated correspondence with four others. His report, submitted to the directors and members of the Foundation in September, 1980, summed up his findings in these words: "The extent and diversity of work being undertaken in the mental retardation field is highly exciting and promising," and proceeded:-

"In genetics, it has, during the past couple of years, become possible, for the first time, to identify and characterize each individual chromosome in human DNA. It follows that any abnormalities or irregularities or deficiencies in the genetic structure of the human cell can be noted. By correlating this with observation and experience, the potential exists of predicting, diagnosing, or confirming any genetically derived factor in life, in health, and in behavior. The implications of such a prospect are staggering, not just for M.R. due to genetic causes, but throughout all the life sciences. This new field is just opening up and there are years and years of work ahead. Obviously, any M.R. research centre with genetic expertise, or possible tie-in with competent geneticists, and whether or not previously so involved, wants to get into this work. This is no passing fad, but an approach of the very greatest potential for workers of real competence and requisite facilities.

As an example, it has been noted that for cases of M.R. for which there is no known cause (not Down's syndrome, or birth damage, or severe childhood illness etc.) there is a significant predominance of males over females. Evidence is accumulating to indicate that this is associated with the presence of an abnormality of an X chromosome, i.e. that the excess of males is genetically derived. The frequency of this X chromosome abnormality seems to correspond with the statistical excess of males. A significant part of the "unknown" cause thus becomes known.

There can be no question as to genetic studies being a vital part of knowledge in M.R. The established results in Down's syndrome, in Tay-Sachs disease, etc. are ample proof of this. Other racial and regional genetic problems are under active investigation and may merit support.

The relation of M.R. to prenatal and perinatal care is known to be very important. Study involves the complex matter of following up on recorded prenatal experience and counselling, on obstetrical practice and observations during birth, and or follow-up during childhood. This is a matter of obstetrician relations, of hospital relations and of public relations so as to get information which is pertinent and reliable, all of which, (human beings being human beings, and not necessarily wanting to be subjects of long range statistical studies on intimate family matters over a period of years) is easier said than done. Serious attempts are being made to collect and correlate significant data. "Normal" pregnancy, "normal" birth and "normal" early childhood are a reference point (whatever the term "normal" means under these circumstances). But any genuine degree of success in pinpointing things promoting M.R. will be welcome, and this is possible.

In the field of physical education, the development of skills, from the most elementary motor skills up, presents special problems to the handicapped, M.R. or otherwise. The development of precise techniques, and the training of staff and of parents in such techniques has genuine promise in reducing the debilitating effects of M.R. (especially in young children, but not necessarily confined to these) and hence alleviating many problems in later life. Precise documentation and progress charts for each individual are essential. Again, excellent work is being done and more is needed.

Closely related to the above is the observation of activity and playtime of groups of *mixed* "normal" and M.R. children, both as members of a family and in nonfamily circumstances. The trend towards getting M.R. children out into the main stream of society, ensuring reasonable protection with minimum interference and promoting maximum integration, is increasingly recognized as desirable. It may be argued that the "research" content of such work is low, but its importance is just really being realized.

A further study of interest is the setting up of a young adult group of the handicapped and having them form their own "club", discussing their own problems and planning activities for themselves. The instructor must keep a low profile but be very observant and help the club

members to manage their own affairs and organize their projects. This approach is, again, just being properly established.

There is much to be done with autistic children and with hyperactive children. Are genetic factors involved either directly or as a tendency? The treatment and alleviation of autism and of hyperactivity present a challenge for research that is well merited.

Another field where data and study are needed, and are difficult to come by, is the relation of mental deterioration to the long range (many years) effect of "slow acting" virus. Facts have to be evolved before constructive action, in terms of virus identification, etc., can be effective. Work in this field will be slow and apparently unrewarding until there is a breakthrough. But, again there is potential.

One centre visited has an outstanding staff in neuropsychology. They are studying specific young individuals with various neurological problems, e.g., as an extreme example, working with a child half of whose brain had to be excised for medical reasons. Remarkably, activity and accomplishment are not worse than slightly below normal. This is a specialized group. It is not certain that they will make a submission, but if they do it may well be of interest.

The above portion of this report has been deliberately cast in a form which can be used not only within the membership of the Foundation but transmitted to the membership of the Rite at large through our representatives.

I have submissions from the Atlantic Research Centre for Mental Retardation and from McGill University. I anticipate perhaps six or more other submissions. I propose the following for consideration by the Directors.

(1) that the Directors establish a committee of 5 members, 3 of whom shall be Directors with instructions to review and evaluate submissions postmarked not later than November 1st next, and to approve awards subject to (3) below and any other instructions of the Board, such awards to be made before the end of the year, and preferably by the beginning of December. The funds so awarded would be forwarded to the re-

- cipients by N.I.M.R. on the instructions of the President, who will have received the Committee's report.
- (2) that the Committee will prepare a summary of the work to be undertaken by the awardees for distribution to the Rite membership.
- (3) that the Directors allocate a sum not to exceed \$100,000 per year for three years for special grants to research centres of the general order of \$20,000-\$30,000 per year per grant, guaranteed in each case for 2 or 3 years as appears reasonable to the need and promise of possible accomplishment.
- (4) that the writer continue correspondence with and, where possible, visits to centres likely to be potential recipients of such grants.

In the above connection, the amount of \$100,000 per year is suggested from verbal information from N.I.M.R. that they had, after receiving \$130,000 in 1980, \$301,000 on hand and commitments for \$41,000 for A awards, \$25,500 for B awards and \$10,000 for their orientation sessions, leaving \$224,000 on hand (all figures rounded off) after paying their 1980 obligations. Even without new contributions from members of the Rite, we have enough on hand for 2 years of special awards right now.

The effect of inflation will continue to require increased dollars to produce the *same* results in future years. There is, and can be, no argument about maintaining a cushion with N.I.M.R., but the inflationary erosion of capital necessitates the creation of "equity", — our equity being progress in the field in which we are committed.

The writer emphasizes, in the strongest possible terms, that in the selection of awardees, there is no such thing as a "best" program. Research is far too experimental and chancy for that to be stated in advance. All the directors and the Rite at large can ask is that we support programs with apparent real merit, programs which looked "good" when the awards were made. There is never certainty of success in any given research program. It would not be research if this were the case.

The writer also recommends that, for this year's awards, one, and not more than one, be in the genetic field. If a second award in genetics is to be made, it can

wait until next year, when it is hoped that further awards (possibly fewer in number, depending on our subscriptions) can be made.

The writer also recommends that all awardees be required to submit semiannual reports on progress to the Foundation. A final report is, of course, indicated at the conclusion of the period of work covered by the award. Such reports would be the responsibility of whoever was directing the work. Recognition of support in publications (e.g. "Financial support for this work was, in part, from The Scottish Rite Charitable Foundation of Canada") would be normal practice. Awardees should be told that we expect their results to be published.

The writer has assured Dr. Neufeld and Mrs. Ioannou that we will continue to work with the N.I.M.R. and keep them informed of our actions as these develop in this second phase of our progress. They will receive a copy of this report.

All of which is respectfully submitted,

Charles A. Sankey *Vice President*.

The recommendations contained in the report were approved in principle at once and authority was given to the Board of Directors to implement the proposed program. At the Annual Meeting the action of the Board was approved and confirmed after I had explained that the purpose of my resolution was to permit grants to be directed now to assist research programs presently being carried on in Canadian universities while at the same time not abandoning research opportunities through the bursary program. Many plaudits were bestowed on Dr. Sankey.

In accepting reelection as Vice-President and responsibility for directing the new program of research awards Dr. Sankey wisely insisted that a Committee on Awards should be appointed to assist him. He was invited to name his own personnel. The Board accordingly elected Dr. Sankey as Chairman and named Lyle Bergstrom and myself to the Committee, with power to appoint additional members. It was of vital importance that the additional members possess the highest professional qualifications and that they be selected with utmost care. In this task of selection Dr. Sankey succeeded brilliantly.

The first professional choice was, of course, Dr. Neufeldt. M.A. in Psychology from the University of Saskatchewan, and Ph.D. in

Psychology from the University of Hawaii, his service in the Western Provinces in Psychiatric Services and from 1976 as Director of the National Institute on Mental Retardation, had given him very special aptitude for working with the Foundation. He had been understanding and co-operative at all times. Unfortunately, however, Dr. Neufeldt in early 1981 retired from his post in the National Institute on Mental Retardation to become Senior Partner of Applied Research Consulting House and never attended a meeting of the Awards Committee. He took with him into his new career the cordial good wishes of all with whom he had been associated in the Foundation.



He was succeeded by Dr. Hugh G. Lafave, Executive Vice-President of the Canadian Association on Mental Retardation. A graduate of the University of Saskatchewan McGill, he is a medical doctor and psychiatrist. After serving the University of Saskatchewan as Professor of Psychiatry and the Psychiatric Services Branch of the Saskatchewan Department of Health as its Executive Director, he joined the Canadian Association on Mental Retardation in 1979. In addition to his executive duties with the Canadian Association on Mental Retardation, he bore responsibility on

behalf of the National Institute on Mental Retardation for its research and training work in the field of mental retardation. Unfortunately, ill health compelled him to retire in early 1984.



Dr. Katerina Haka-Ikse, M.D., Ph.D., F.R.C.P., is an eminent figure in the field of paediatrics in Canada. Born in Athens, awarded doctorates in both medicine and philosophy from the University of Athens, followed by further postgraduate studies at Yale and Paris, a Fullbright Scholar, in the course of a brilliant career she has held many outstanding appointments. A Canadian citizen, she is Associate Professor of Paediatrics at the University of Toronto Medical School, Senior Staff Physician at the Hospital for Sick Children, Toronto, and President of the Canadian Paediatric Society.

She has been a member of the Awards Committee from the outset, and has rendered an invaluable service.



In 1981 the National Institute on Mental Retardation took the prudent course of appointing a businessman as its Director. He is Mr. Jacques Pelletier, B.Sc. (Ottawa University), M.PA. (Master of Public Administration) of the Université du Québec. He had served previously as Executive Director of the Ouébec Association for the Mentally Retarded. Since his appointment with the National Institute on Mental Retardation, most of the Foundation's business contacts have been with Mr. Pelletier. They have been made unfailingly pleasant by the co-operative attitude of the

amiable and efficient Mr. Pelletier. With the retirement of Dr. Lafave, his place on the Awards Committee was assumed by Mr. Pelletier, now Executive Vice-President of C.A.M.R.

To the original three directors of the Foundation on the Awards Committee were added in 1981 Dr. N. Richard Richards, and in 1982 Mr. Robert G. Loftus. Dr. Richards possesses lengthy experience in research work and as Professor and Dean of the University of Guelph. Mr. Loftus, elected Grand Chancellor of Supreme Council in 1983, was first nominated as his personal alternate on the Committee by Lyle Bergstrom, then appointed in his own right when Ill: Bro: Bergstrom became Sovereign Grand Commander in 1983. In 1984 Bro. Richards was elected to the Board of Directors, and both he and Bro. Loftus were reappointed to the Awards Committee.



Robert G. Loftus was born in Northern Ireland and immigrated to Canada in 1929 where he was engaged in industry for forty years, and latterly in industrial accident prevention. An active Churchman, Rotarian, and welfare worker, he has served many good causes in an executive capacity. He was initiated in Occident Lodge in 1940, served it as Worshipful Master in 1952, and was District Deputy Grand Master of Toronto District 2 in 1956-57. He joined the Scottish Rite in 1950, served as Most Wise Sovereign of the Toronto Sovereign Chapter of Rose Croix in 1964, was coro-

neted an Honorary Inspector-General, 33° in 1967, and crowned a Sovereign Grand Inspector-General in 1973.

The Awards Committee has met regularly in the autumn and spring of each year since its formation in September, 1980. It has faced a mountain of paper to sift in support of the numerous applications which have been submitted for financial awards. In its first year the Committee received no fewer than twelve applications from all across Canada. Of these it selected four for grants renewable over a period of three years. Applications have continued in similar volume in subsequent years. Technically the Committee assists the President to decide thereon. Each recipient is required to make a semi-annual and a final report to the Foundation. Publication of research results is expected, accompanied by an acknowledgment of financial support by the Foundation. The awards commenced at \$25,000. each per annum, but have since been increased in amount to keep pace with inflation.

These major awards constitute a significant expansion of the work of the Foundation, and have come to be known as Phase Two. They were never intended to reduce the bursary program, (now known as Phase One) which still thrives on funds contributed by the Foundation. The National Institute on Mental Retardation is kept fully aware of the details of all applications. In 1980–1981 four bursaries were awarded to post-graduate students from institutions which applied for but did not receive major awards.

Admittedly, the Awards Committee is operating in a highly technical field, and some members of the Committee may not be professionally versed in some aspects of the research applications which are presented to them, but the professional members of the Committee have been most helpful. I do not believe any application, however technical, scientific and abstruse the language in which it is couched, has ever been approved or rejected until fully understood by every member of the Committee. The language becomes ever more technical and scientific. Dr. Sankey has done wonders in mastering the applications and in his reports to the directors and members of the Foundation explaining them in language comprehensible to laymen.

It has been the practice year by year for the Board to authorize research projects and make awards until the next Annual Meeting, subject to the approval of the President, and subject to the foregoing, to allow as heretofore at least ninety per cent of the Foundation's income to be paid to the National Institute on Mental Retardation.

In 1981 Dr. Sankey was appointed to the Awards Committee of the National Institute on Mental Retardation. This was a tribute to his competence and fair-mindedness. It has also helped to bring the Foundation and the National Institute on Mental Retardation closer together. He does not sit on that Committee as a representative of the Foundation, but in his own right as a person of recognized capacity. Needless to say, this appointment, which involves more work than honour, has not influenced Dr. Sankey in the discharge of his duties as Chairman of the Awards Committee of the Foundation.

Commencing in September, 1981, Dr. Sankey has given an extended and very informative Annual Report on the operations of the Phase Two program to the Board of Directors. This proved so instructive that at my suggestion it has been repeated each year from 1981 to 1984 in the General Session of Supreme Council, where it has won high praise and been the means of acquainting hundreds of Honorary Members with the progress being made in research in mental retardation. There has undoubtedly been in consequence a much wider interest and a much deeper knowledge of what the Foundation has been accomplishing in the field of research than ever was the case in the years before Phase Two was introduced. Other means have contributed to the same end. At luncheon on September 16th during the 1983 Annual Meeting of Supreme Council, Dr. Donald R. McLachlan of the Department of Physiology of the University of Toronto delivered a paper on "Alzheimer's Disease" to an audience of nearly 500 members which should have been augmented by the presence of the ladies, who would have found the paper intensely interesting. He was heard with rapt attention. This experiment was so successful that Dr. Patricia Baird of the University of British Columbia addressed a similar luncheon at the Annual Meeting of Supreme Council in 1984 on the role of genetics in mental retardation. Such opportunities have unquestionably given members of the Scottish Rite an ever increasing sense of pride in the role their Foundation has played in research in mental retardation.

Indeed, much more prominence has been given to that role in recent meetings of Supreme Council outside the Annual Meeting of the Foundation. For this credit can be given to President Austin, who has been a tireless propagandist for the Foundation, to Dr. Sankey, for delivering reports which, though related to highly technical subjects, have been brought within the grasp of members, and to the sympathetic support of Sovereign Grand Commanders like Walter Mortlock and Lyle Bergstrom, who have seen that an ample place has been provided on the agenda for delivery of the reports.

Furthermore, commencing in 1977 these reports have been published in the printed Annual Proceedings of Supreme Council. Although reports on behalf of the Foundation were regularly printed in the Annual Proceedings up to and including 1969 it is a regrettable fact that from 1970 to 1976 inclusive no report of the Foundation found a place in the printed Annual Proceedings of Supreme Council. Indeed, a rather grudging single sentence in the minutes that President Howard B. Moore or President Roy Austin gave a short report on the activities and aims of the Foundation or that one of them presented the report of the Foundation and that it was received and adopted is all the space that was found for the Foundation and its reports in those years, and in one year the Foundation escaped mention even in the Allocution. Space has been found in recent years, fortunately, for the reports of the President and Dr. Sankey, although not for the reports of the Treasurer and the auditors. Anyone wishing to examine the Foundation reports for the first seven years of the seventies must consult the records in the office in Hamilton. Needless to say, those responsible for directing the affairs of the Foundation are much encouraged that two of the Annual Reports of their officers have latterly been preserved in the Printed Proceedings of Supreme Council.

It would not do justice to Dr. Sankey's annual reports to attempt to condense them; their contents have already been condensed by him before presentation. Likewise, it would be incomplete to publish this volume without including in detail year by year the advances in research in mental retardation that have been made as the result of the Foundation's sponsorship. I have therefore thought it fitting to publish in the Appendix the full text of Dr. Sankey's annual reports for the four years 1981–1984, inclusive. Those who are inter-

ested in what has been achieved to date, all of it made possible by donations to the Foundation, will find these reports a gold mine of information and a thrilling account of scientific advance in the field of mental retardation.

To the regret of all Dr. Sankey suffered a heart attack in early 1984, and was compelled to retire from the Chairmanship of the Awards Committee. He continues, however, to serve as a member of the Committee. The Chairmanship was accepted by Dr. Richards. At the Annual Meetings of both the Foundation and Supreme Council in September, 1984, grateful tributes were paid to Dr. Sankey's monumental service as Vice-President of the Foundation and Chairman of the Awards Committee. He was accorded a standing ovation at both meetings.

CHAPTER 15

PROBLEMS OF FINANCE



From September 1979 to the end of 1984 six new members were elected to the Board of Directors. They are Ill: Bros: Bergstrom, Martin, MacLean, Steeves, Bennett and Richards.

Lyle Herbert Bergstrom was born in Wisconsin, U.S.A. and when two years old moved with his parents to Saskatchewan in 1914. His entire life has been devoted to education. A graduate of the University of Saskatchewan (B.A.) and the University of Toronto (B.Paed.), a school principal for several years, he joined the Saskatchewan Department of Education in 1944, rising to the posts of Deputy Minister and Special Advisor to the Minister. He served in nu-

merous posts at the national and international levels. He is an active Churchman and a leader in community activities. He entered Masonry in 1945, served as Worshipful Master in 1949, District Deputy Grand Master in 1954, Grand Junior Warden in 1957, and Grand Master of the Grand Lodge of Saskatchewan in 1960. He joined the Scottish Rite in 1962, and served as Commander-in-Chief of Saskatchewan Consistory in 1972–1973. He was coroneted an Honorary Inspector-General, 33°, in 1972, and crowned a Sovereign Grand Inspector-General in 1974. He served as Lieutenant Grand Commander 1979–1982, and was installed as Sovereign Grand Commander in 1982. He has served as a director of the Foundation since 1979.

Lionel Cecil Martin was born in England and came at the age of five to reside in Canada in 1911. The balance of his life has been spent in Montreal, including 46 years in the service of Northern Electric Company. He was initiated into Masonry in 1942, was Worshipful Master in 1954 and District Deputy Grand Master in 1960. He joined the Scottish Rite in 1945 and served as T.P.G.M. of Hochelaga Lodge of Perfection in 1956. He was coroneted Honorary Inspector-General, 33°, in 1965 and crowned a Sovereign Grand Inspector-General in 1976. He served as Deputy for the Province of Quebec from 1976–1980. He served as a director of the Foundation from 1980 to 1984, when ill health compelled his resignation.

Nigel Malcolm MacLean was born in Victoria, B.C. in 1921 and has spent his life in Vancouver. He has followed a career in the food supply business. He was initiated into Masonry in 1947, was Worshipful Master in 1956 and is an officer of the Grand Lodge of British Columbia. He joined the Scottish Rite in 1951 and served as T.P.G.M. of the Vancouver Lodge of Perfection in 1962. He was coroneted an Honorary Inspector-General, 33°, in 1965 and crowned a Sovereign Grand Inspector-General in 1979. He has served as a director of the Foundation since 1982.

Ingram Dale Steeves was born in Moncton, New Brunswick in 1922. He served overseas in World War II from 1941 to 1946. He graduated from the Nova Scotia Agricultural College in 1948 and from the University of Manitoba (B.S.A.) in 1950. He has served the New Brunswick Department of Agriculture ever since, apart from two years on loan to Kenya. An active Churchman and Rotarian, he entered Masonry in 1946, and served as Worshipful Master in 1962, District Deputy Grand Master 1967–1969 and Grand Master of the Grand Lodge of New Brunswick in 1982. He entered the Scottish Rite in 1954, was coroneted an Honorary Inspector-General, 33° in

1971 and crowned a Sovereign Grand Inspector-General in 1975. He was elected a director of the Foundation in 1982.

Gordon Lockhart Bennett was born in Charlottetown, P.E.I., in 1912. He was educated at Prince of Wales College and Acadia University (B.Sc., & M.Sc.). His whole life thereafter was spent in Charlottetown and devoted to education. He entered public life in 1966, serving as a Member of the Legislature, Minister of Education and President of the Executive Council. He was Lieutenant-Governor of P.E.I. 1974–1980. Always involved in Church work, sports and cultural activities, he has held many offices. He entered Masonry in 1953, serving as Worshipful Master in 1961 and Grand Master of Masons in P.E.I. in 1967. He served Albert Edward Lodge of Perfection as T.P.G.M. He was coroneted an Honorary Inspector-General, 33°, in 1968 and crowned a Sovereign Grand Inspector-General in 1970. He became Lieutenant Grand Commander in 1982 and was elected a director of the Foundation in 1983.

Norval Richard Richards was born at Kinlough, Ontario in 1916. His early education was in the public schools of Bruce County and Lucknow High School. He holds the degree of Bachelor in Agricultural Science from the University of Toronto (O.A.C.), Master of Science from Michigan State University, and Doctor of Science (honoris causa) from Laval University. His life has been devoted to soil science and land resource use, embracing teaching, research and administrative responsibilities. He served the federal Department of Agriculture for 13 years and then for 11 years as Professor and Head of the Soil Science Department, then for 10 years as first Dean of the University of Guelph. In 1974 he was elected President of the Agricultural Institute of Canada. He holds many professional honours. He is a very active Churchman and office-bearer.

He was initiated into Waverly Lodge, Guelph, in 1943 and served it as Worshipful Master in 1951 and 1952. After long service on the Board of General Purposes and as Chairman of the Committee on Masonic Education he was Grand Master of The Grand Lodge of Canada in the Province of Ontario 1979–1981. In 1956 he was T.P.G.M. of Royal City Lodge of Perfection, in 1959 M.W.S. of Guelph Chapter of Rose Croix. In 1963 he was coroneted Honorary Inspector-General, 33°, and in 1974 crowned Sovereign Grand Inspector-General. Currently he is serving as Provincial Grand Master of the Royal Order of Scotland. He has been a director of the Masonic Foundation of Ontario since 1963 and its President since 1982.

From the inception of the Foundation a total of 27 persons have served as directors, thirteen of them have also served as officers. Of the eleven present directors eight are Active and three are Past Active Members of Supreme Council.

In 1980 Donald Witter, who had held the position of Treasurer since 1976, tendered his resignation as both director and Treasurer prior to the Annual Meeting and it was accepted with regret. He did not attend the September meetings and his report was read by the Secretary John Lawer. I was asked by President Roy Austin and the Sovereign Grand Commander Walter Mortlock if I would undertake the office. I had recently completed my service with the Bank of Nova Scotia in the Bahamas, and although I was still residing there, it was considered that with my monthly trips to Toronto I would be in a position to discharge the duties of the office. Accordingly, from September, 1980 until September 1984 the officers of the Foundation were:-

President — Roy Austin Vice-President — Dr. Charles A. Sankey Secretary — John V. Lawer Treasurer — Donald M. Fleming

In September 1984 Dr. N. Richard Richards was elected Vice-President and the other 3 officers were reelected for the year ending September, 1985. Since the retirement of Ralph Rutherford in 1982, John C. Allan has been Assistant Secretary and John W. Lowry Assistant Treasurer. Stability has certainly marked the holding of offices in the Foundation throughout its history. In January, 1985, I resumed residence in Toronto.

Whether the criticisms which I had voiced of investment policy had anything to do with my being asked to accept the Treasurership in 1980 I know not, but these criticisms were well known. I have already mentioned them in Chapter Twelve. I was concerned at the lack of diversification. Nearly all the bonds which were being purchased were "longs", usually twenty years to maturity, and corporation bonds were being acquired to the virtual exclusion of Canada and municipal issues. The fact that the Foundation did not "trade" securities, but was accustomed to retain them to maturity was in my opinion no reason to concentrate our holdings in the long end of the market, and this policy had been pursued for years. On receiving the Treasurer's Financial Statement for the year 1977, I was concerned over the following statement of the investment policy which the Investment Committee proposed to follow:-

"Your Investment Committee proposes, for the present and as opportunity offers, to maintain one-third of our holdings in government (direct and guaranteed)

bonds and the balance in corporations. As to maturities, it is proposed to hold seventy five per cent in long term; this proportion has become diluted during the year by the transfer of \$100,000. from long to medium term."

I thereupon wrote Treasurer Witter the following letter dated 30th June, 1977:-

Dear Don:-

I have just received the Auditor's Report on The Scottish Rite Charitable Foundation of Canada together with your own Annual Financial Statement dated June 23rd, and have carefully studied both.

Thank you for setting out the policy which the Investment Committee proposes to follow. I think it only fair to write to you now in that regard instead of waiting until we meet in Hamilton in September.

I realize that we do not trade in securities; indeed, we rarely dispose of any. Our policy is to hold bonds to maturity. I realize also that you are seeking the highest interest return on our bond investments consonant with security. I am obliged, however, to take a somewhat different view of the investment policy appropriate to the Foundation and its aims, needs, and circumstances. I think we should have more than ½ of our holdings in Government bonds. Equally, I think the proportion of our portfolio investment in corporate issues is definitely too heavy. Particularly, I think that the proportion of our portfolio which we hold in Government of Canada bonds (1.55%) is low in the extreme. We are very heavily invested in Provincial bonds to the virtual exclusion of Federal and Municipal issues. I would propose that we aim by stages to increase our holdings of Government issues to 40%, and within this total to increase our holding of Government of Canada issues to approximately 15%. I think also that we should increase our holdings of class "A" Municipal (eg. Ottawa-Carleton, Toronto, London) to, say 8 or 10%, as soon as such issues become available in Canadian currency.

In regard to maturities, I think the policy is much too heavily weighted in favour of the long-term. I fully realize that more issues are presently available in the twenty-year maturities and that the rate is higher than for medium and short-term securities. Nevertheless, in the face of inflation

and the attendant uncertainties I firmly believe that our maturities should be equally distributed between short, medium and long-term, and that our portfolio is now of such a size as to justify and indeed require a properly phased programme of well distributed maturities year by year. At least this should be the goal toward which our investment activities ought to be directed.

I thought I owed it to you to convey these thoughts to you in advance of the discussions in September.

His reply was as follows:-

Dear Don:

Thanks for your letter of June 30th.

In distributing the financial information prior to our Annual Meeting, I thought that the Directors might like to approve a general policy to be followed, insofar as practical, by our Investment Committee.

I, personally, would not object to a reduction, as you suggest, in the 3/3 rds proportion of corporation bonds but we would have to be prepared to accept a reduction in our income by doing so, and even more if it were decided to go into Canada's to any extent. I haven't much feeling for Canada's in a portfolio such as ours but if we do so because they are considered the ultimate (?) I would much prefer, to improve yield, to place some of our short and medium term money into Canada-guaranteed trust company deposits and/or Canada-guaranteed mortgages. Now, I am not suggesting that we do this and would be agreeable to putting, say, \$25,000 Canada's in our list.

As to maturities, I find this an area where hindsight proves rather remarkable showing, for instance, that the Bank of Canada rate dropped two full points in less than six months during the year. I suppose that under a really conservative policy we would spread maturities so that 1/25th would mature each year; this would be a distribution of 20, 35 and 45%. I must say that I doubt that our Committee would support any proposal that would not see a major proportion of our investments in long term.

Your proposals will provide an interesting discussion.

With kindest regards, sincerely

D.L. Witter

The Investment Committee pursued its policy to the point where at the first of its September, 1980 meetings and before I had agreed to accept the Treasurership the Board expressed concern at the "imbalance in holdings among short, medium and long term maturities in favour of long term maturities" and adopted my following resolution:- "In our investment policy our efforts should be directed to reducing the heavy percentage of our investment holdings which are in the long maturities and increasing our holdings in the short maturities with a view to reducing the overall life to maturity of our investment portfolio." The same question arose at the Annual Meeting of members on September 10th, and the resolution of the directors was warmly approved. Once elected Treasurer it became my responsibility to overcome the imbalance in the investment portfolio, but this could not be achieved in a day or a year.

At June 30, 1980, the date from which I took over responsibility, the capital stood at \$1,412,689. We were closing in on our goal of \$1 $\frac{1}{2}$ million. An annual appeal scheduled for the late autumn and accompanied by the use of blue envelopes, was well established and had behind it the vigorous drive of President Roy Austin.

In the fiscal twelve-month period ended June 30, 1981, donations from individuals rose to \$60,333, an increase of one-third, donations from Lodges rose 35 per cent to \$18,690, while bequests declined 54 per cent to \$7,141. Aggregate receipts from donations and bequests increased by 16 per cent to \$86,164. Capital at June 30, 1981 stood at \$1,501,790. Thus the goal had been reached. I promptly announced a new goal of \$2 million by December 31, 1984. Our contribution to N.I.M.R. reached \$137,000, the highest sum for one year up to that time.

In the fiscal year ended June 30, 1982, donations from individuals rose to \$63,446, those from Lodges declined to \$16,293, and bequests soared to \$32,769. Aggregate receipts rose to \$112,488. Capital at June 30, 1982, stood at \$1,631,428. Our contribution to N.I.M.R. reached the sum of \$154,000, an all-time record to date.

In the fiscal year ended June 30, 1983, donations from individuals rose 19 per cent to \$75,166, those from Lodges to \$28,018, an all-time record and an increase of 74 per cent over the previous year, and bequests were \$32,154. Aggregate receipts rose by 20 per cent to \$135,338. Our contribution to N.I.M.R. set a new record at \$170,000. At June 30, 1983, capital stood at \$1,749,616.

In the fiscal year ended June 30, 1984, donations from individuals rose by 20 per cent to \$90,923, those from Lodges by 10 per cent to \$30,890, an all-time record, while bequests declined to \$17,264.

Aggregate receipts thus rose by 3 per cent to \$139,077. The contribution to N.I.M.R. reached \$180,000, a new record. Capital reached a new high of \$1,888,693, within \$111,307 of our adopted goal of \$2 million before the expiry of our first twenty years.

In the fiscal year ended June 30, 1985, donations from individuals rose to \$103,550, those from lodges to \$38,254, and bequests to \$24,686. Aggregate receipts thus increased by 20% to \$166,490. The contribution to N.I.M.R. reached a new record of \$205,000. Capital amounted to \$2,055,183. Old records were surpassed by convincing margins.

Thus in its first twenty years the Foundation has built its capital fund to over \$2,000,000, contributed to research into the causes of mental retardation in total more than \$1,500,000 and more than \$200,000 in one year.

The policy adopted in September, 1980, with a view to reducing the overall life to maturity of our investment portfolio, was strictly followed. All bonds purchased during the year ended June 30, 1981, matured in five years or less. Being locked to such an extent into long maturities it became almost impossible to protect our portfolio from the market erosion then current under the pressure of rising interest rates. Against a par value of \$1,544,500 our bonds at June 30, 1981 had a market value of \$1,062,337, an unrealized loss of one-third. Instead of having bonds regularly maturing as the result of a properly diversified portfolio, our maturities that year were only 3 per cent of our total. We could neither reduce our exposure to the long end of the market nor undertake significant new purchases at the very attractive high interest rates being offered. It was a classic example of being locked into the long end of the market as the result of the earlier and prolonged failure to diversify.

Improvement was slow in the fiscal year ended June 30, 1982. Maturities were slight, giving no real opportunity to react to the market. We were still painfully locked in to "longs". Such small purchases as we made were all in "shorts", none exceeding five years. Weakness of the market, the result of very high interest rates, continued to cause us an unrealized loss of one-third in market value of our portfolio. My recommendation that the policy of reducing our average maturities by the purchase of short-term bonds be continued at least until our long-maturities constituted not more than half of our investment portfolio was adopted at the September meetings without dissent.

The year ended June 30, 1983, witnessed a marked improvement in our portfolio. With the decline in interest rates and the

strengthening of the bond market our portfolio recovered virtually all the paper loss we faced a year earlier. Moreover, although we had no maturities to assist us we have made marked progress in reducing the average life to maturity of the portfolio.

The rigorous application of our 1980 policy decision had produced very beneficial consequences. We had reached the goal I had defined in my 1982 report where "our long maturities constitute not more than half of our investment portfolio." I therefore recommended a modest modification of the severe 1980 policy. For new acquisitions I now proposed that bonds in maturities up to, but not exceeding, ten years be purchased where they offer an advantage of at least half of 1 per cent higher yield than those of short maturity. This proposal was approved and has enabled the Foundation to ease suitably the rigours of the 1980 policy, while allowing us to increase our investment income. These policies were again endorsed by the Board and the Annual Meeting in September 1984. The success which they had achieved is demonstrated by the following statistics of our bond holdings at year-end.

	1980	1981	1982	1983	1984	1985
Up to 5 years	7.5%	13.6%	20.8%	29.6%	29.3%	16.9%
6 to 10 years	7.5%	18.7%	20.5%	22.8%	34.9%	57.3%
Over 10 years	85. %	67.7%	58.7%	47.6%	35.8%	25.8%

Due to the overall strength in prevailing interest rates the high market value of our bond portfolio at the commencement of the year was not maintained. At June 30, 1984, our bond holdings had a par value of \$1,885,000, had cost us \$1,867,649, and had a market value of \$1,548,109. Our policy has always been to hold bonds to maturity; consequently, we have sustained no realized losses.

The statistics on individual donations are less gratifying. In the year ended June 30, 1984 the number of individual donors from among our Scottish Rite members was 2,329, a 13.4 per cent increase over the 2,055 of the previous year; that is to say, out of a total membership of 34,584 Brethren, all dedicated to the virtue of charity, 2,329, or less than 7 per cent, contributed to the one charitable enterprise officially sponsored by Supreme Council. The average individual donation was nearly \$40, but the average donation by all Scottish Rite members in Canada increased only from \$2.86 to \$3.42.

In 1982 the Board found it necessary in the light of Income Tax legislation to re-examine its status as a charitable foundation required to distribute at least Ninety per cent of its income during the year, and to compare it with the status of a "charitable organization"

under the Act. The Secretary, John Lawer, examined into the question and discussed it with officials of Revenue Canada. Would it be of advantage or concern to the Foundation to operate its own charitable activities directly? The Board thought not and opted not to change its status.

This meant, however, that the Foundation must continue to distribute to charitable objects at least ninety per cent of its income during the year of receipt. It was not difficult in accounting to calculate and pay this sum to N.I.M.R. but it was quite another matter for N.I.M.R. to disburse the proceeds evenly in the year of receipt from the Foundation. The balance in the hands of N.I.M.R. tended to build up and to vary widely at different periods of the year. It reached a peak of \$462,781 at September 1, 1982, though this was quickly reduced when the Phase Two Research Program swung into operation. The Awards Committee in effect was working to reduce the backlog of uncommitted funds which had been built up in the hands of N.I.M.R. Some directors nonetheless were worried over the size of the backlog. It was embarrassing to be asking our Scottish Rite members to increase their donations when the same were not being fully employed in the current research program even as extended by Phase Two.

The backlog attracted the attention of more than the directors of the Foundation. It was earning interest in the hands of N.I.M.R., but at what rates and under what terms of investment and security the directors of the Foundation did not know. Yet whether the backlog rose or fell the Foundation must transfer at least ninety per cent of its income to N.I.M.R. or to it and other charitable objects. By now our appeal was so closely identified with research in mental retardation, however, and our research program was producing such interesting, hopeful and satisfactory results would it be wise to attempt to divide our support between N.I.M.R. and some other and perhaps quite different charitable object? Moreover, the backlog might undergo drastic reduction as the Awards Committee pursued its goals. By December 31, 1983 it had been reduced to \$160,804. Such questions led the directors in circles.

And then one fine day the President received a letter dated February 16, 1982, from Mr. Jacques Pelletier, Director of N.I.M.R., requesting the Foundation to give favourable consideration to authorizing payment to N.I.M.R. for expense incurred by it in administering the Foundation's research program over the past five years. As to the future, it was further proposed that the Foundation authorize payment to N.I.M.R. of an amount equal to N.I.M.R.'s costs, to be reported to the Foundation on a semi-annual basis, but

not to exceed the interest earned on the funds in the hands of N.I.M.R. At a meeting of the Board on April 24, 1982, this proposal out of the blue was discussed and referred to a Committee which I was asked to appoint and chair. I appointed Lyle Bergstrom, Charles Sankey, John Lawer and John C. Allan.

This led to a meeting on May 25, 1982, attended by all five members of the Foundation's Committee and Jacques Pelletier, Fred Ritzmann, C.A. (Treasurer of C.A.M.R.) and Melodie Zirzeczny, representing N.I.M.R. The atmosphere was most pleasant. N.I.M.R. offered any statements which might be required. Mr. Ritzman stated that C.A.M.R. had an investment fund of approximately \$3 million, composed of donations from various sources, administered for a variety of projects. For Foundation donations segregated accounting was maintained but to facilitate investment the funds themselves were not segregated. N.I.M.R. was faced with a cash flow problem. The Foundation was acknowledged to be its largest source of funds. Information requested by the Foundation directors was readily supplied.

Subsequently the Foundation Committee met, together with Sovereign Grand Commander Walter Mortlock, and framed four recommendations to the Board of Directors, as follows:-

- 1. That N.I.M.R.'s request in respect of periods to April 1, 1982 be not entertained.
- 2. That requests for grants in respect of fiscal periods subsequent to April 1, 1982 be considered on their merits as and when submitted and substantiated to the satisfaction of the Board of Directors of the Foundation.
- 3. That in anticipation of the receipt by the Foundation from C.A.M.R./N.I.M.R. of regular quarterly financial statements, the administrative officer designated by the Board of Directors be instructed to verify such statements as received and report to the President for action by the Board at its April meeting.
- 4. That subject to receipt of accounting from C.A.M.R./N.I.M.R. satisfactory both as to frequency and content, the Foundation do not at the present time press the issue as to the segregation of funds donated by the Foundation to the Institute.

The report and recommendations were received and adopted by the Board September 7th, and subsequently reported to the Annual Meeting. N.I.M.R. willingly accepted the terms contained in the recommendations, and has since regularly rendered an accounting at half-yearly intervals of its expenses attributable to administering the funds contributed by the Foundation. In the first year these amounted to \$21,000. and are growing. The accounts have been checked by John Allan, approved and paid.

In September, 1982, N.I.M.R. submitted another interesting proposal. N.I.M.R. was producing documentary films in French and English entitled "Diagnostic and Evaluation" for use in training medical students and paramedics, to be provided to every Medical Faculty or School in Canada and to non-medical schools for mental retardation Counsellor Courses. Directors were favourably impressed with the films and the Foundation contributed an estimated 10 per cent share, \$26,500, to the cost of producing the films. One of the films won first prize at the Yorkton Film Festival. The contribution was provided out of funds in the possession of N.I.M.R.

Occasionally some border-line case will arise relating to a grant or a bursary as to whether in its nature it will advance research in mental retardation. The Awards Committee and the Board have taken a broad view in such cases. The propriety of an award or bursary has never been challenged. On the application of Dr. Haka-Ikse Chairman of the Mental Health Committee of the Canadian Paediatric Society, (and a member of the Foundation's Awards Committee) a grant of \$1,500 was made to assist the Society to organize the Symposium on Behavioral Paediatrics in Quebec City in June, 1983. This was duly included in the Treasurer's Report for the year. The Symposium did not relate exclusively to mental retardation, nor, on the other hand, was mental retardation excluded from its scope. There will always be borderline cases in any medical program.

Looking back over the years since 1980 the role of Treasurer has not proved an idle sinecure. Any tasks, however, have been lightened and made pleasant by the co-operation and painstaking efforts of the other officers, and notably of John Allan, Jack Lowry, Mrs. Beatrice Ferrie, and Miss Diana Gunderman in the Hamilton office. They have carried on a worthy work initiated by Ralph Rutherford and Miss Marion E. Lees. The Foundation has been blessed at all times with the aid of a devoted and competent team.

CHAPTER 16

THE GRAND ACCOUNTING

To June 30, 1985 the Foundation through its Research Awards and Bursary programs has contributed for research into the causes of mental retardation, virtually all through the National Institute on Mental Retardation, a total of \$1,568,400.

A total of 335 Bursary grants, ranging from \$500 to \$6,000, have been made to students, virtually all doing post-graduate work, all across Canada. All were carefully screened.

Annual grants to support major research in universities and hospitals over the last four years total \$581,500 as follows:

(a) Dr. Patricia A. Baird and Association, Department of Medical Genetics, University of British Columbia.

Project "Study of the Marker X Chromosome associated with X-linked Mental Retardation"

First grant \$25,000.00 Second grant 25,500.00 Third grant 30,000.00

A further grant of \$8,000.00 was made in 1983 to cover work on "Down's Syndrome: survival for the B C population"

Total grants \$93,500.00

(b) Dr. Noreen L. Rudd and Associates, Departments of Pediatrics and Medical Biochemistry, University of Calgary.

Project "Assessment of Genetic Screening Techniques in the Prevention of Mental Retardation"

 First grant
 \$25,000.00

 Second grant
 27,500.00

 Third grant
 30,000.00

 Fourth grant
 31,500.00

 Total grants
 114,000.00

(c) Dr. Abby Lippman, Department of Epidemiology and Health, McGill University, Montreal.

Project "Genetic Epidemiology of Down Syndrome and Neural Tube Defects."

First grant	\$25,000.00
Second grant	30,000.00
Third grant	31,500.00
Total grants	86,500.00

(d) Dr. Matthew W. Spence and Associates, Atlantic Research Centre for Mental Retardation, Halifax.

Project "Prenatal and Perinatal care and Mental Handicap"

First grant	\$25,000.00
Second grant	13,000.00
Third grant	11,500.00
Total grants	49,500.00

(e) Dr. Jeanette J. Holden and Associates, Department of Biology, Queens University, Kingston

Project "Identification of a DNA Marker closely linked to the Mutation causing X-Linked Mental Retardation"

First grant	\$27,500.00
Second grant	30,000.00
Third grant	31,500.00
Total grants	89,000.00

(f) Dr. Donald T. Whelan and Associates, Department of Pediatrics, McMaster University, Hamilton.

Project "Inborn errors in Metabolism: Organic Aciduriae, an investigation of Excretion Patterns in Infants and Adults".

First grant	\$27,500.00
Second grant	30,000.00
Total grants	57,500.00

(g) Dr. Donald R. McLachlan, Department of Physiology, University of Toronto, Project "Nuclear Proteins in Alzheimer's Disease and Downs Syndrome".

First grant	\$30,000.00
Total grants	30,000.00

(h) Dr. Judith G. Hall, Clinical Genetics Unit, University of British Columbia, Vancouver.

Project "Maternal Preconception Vitamin Supplementation in the prevention of Neural Tube Defects".

First grant \$30,000.00 Total grants 30,000.00

All the above totals have been materially increased by additions awarded in the fiscal year 1984–85.

CHAPTER 17

RETROSPECT

That the Scottish Rite Charitable Foundation of Canada has achieved success is by any standard of measurement a demonstrable fact. That that success has exceeded all expectations may be a rebuke to our little faith. That it has surpassed even the dreams of its founders I can and do testify. That these achievements would be attained in but twenty years would at its beginning have strained credulity.

That some might be tempted to think that success came easily, that all must have been clear sailing, may be one price of success. This volume should help to dispel any such misconception. There were years of slow growth. No miracles were wrought in the early days. The Foundation has never been totally free of nagging problems. There have been times when the wisdom of our chosen course was seriously questioned. In looking back over the span of twenty years there is no good reason to ignore the problems or over-simplify the questions. The aim of this volume has been simply to record facts as they occurred, never to exaggerate, to reduce, nor to invent.

Certain conclusions must be manifest. The creation of the Foundation was an act of high statesmanship. Something of permanent value was produced by men's minds and hands. All who come after will owe a debt to the leadership and the vision of the few of 1964.

Wisdom and foresight guided those first directors in choosing the rule of capitalizing donations. The attempt at Ottawa in 1984 to reclassify charities and to change the rules applicable to their status, to their financial operations, and to the tax-deductibility of donations to them did not prejudice the Foundation and its supporters. The Scottish Rite Charitable Foundation of Canada has been officially designated as a private foundation under the new rules. The provisions which were inserted in our letters patent twenty years ago on the advice of James Gow, Q.C., were proof against the attempted reclassification. The Foundation will continue to capitalize all donations received and to distribute its income for charitable purposes, and its donors will enjoy the same income tax benefits as heretofore for their donations.

The choice of research in the field of mental retardation as the object of the Foundation's charitable pursuit was vastly wise; in my opinion it was a great deal more: in God's mercy it was providential. God moves in a mysterious way his wonders to perform.

In 1964 mental retardation was virtually an unoccupied field. Our Foundation entered it at what proved to be a critical moment. As a result the Foundation established itself as the leader in supporting research in mental retardation in Canada. We have never attempted to exclude anyone else from entering the field; we have never discouraged any other organization or any government from aiding the same cause. Indeed, in 1983 we had occasion to make it very clear to an applicant for our financial support of a research project that it was totally at liberty to seek and receive aid from other sources at the same time, and to another applicant that it was expected to obtain aid from another source. We did not appropriate the field, but we rejoice that wherever knowledgeable men in this bread land in 1984 speak of research in mental retardation they speak also of The Scottish Rite Charitable Foundation of Canada.

It is a blessing that we concentrated our resources on this one field. We resisted persistent temptations to fragment our benevolence and to seek out charitable objects which would have produced quicker or more striking results. We had set sail on a long course; we stayed on course these twenty years, knowing that the efforts might be prolonged and the benefits elusive. But we held to our course. We shall never have cause to reproach ourselves for having been deflected from it.

We possessed the patience to move forward gradually as we found opportunity and gathered experience and sophistication. We take pride and satisfaction in both Phases of our program. Phase Two is a thrilling and challenging endeavour on a high level. But Phase Two would not have been possible without Phase One. That less spectacular program had to come first. It had to prepare the way.

The marriage of our efforts with those of the Canadian Association for Retarded Children, later the Canadian Association for the Mentally Retarded, and its research arm, The National Institute on Mental Retardation, was necessary to our Foundation's success, as it was also to the success of our partner. It has meant that our effort has been guided by intelligence, knowledge and expertise, and not mere good intention.

That there still attaches to the phrase "mentally retarded" a lingering and deplorable stigma has long been one of the problems confronting those engaged in this field. After suffering for years from the embarassment created by its own corporate name in this respect The Canadian Association for the Mentally Retarded at a special general meeting on June 22, 1985, changed its name to The Canadian Association for Community Living (L'Association canadienne pour l'intégration communautaire). Mr. Jacques Pelletier, Executive Vice-President, commented:

"The basic and fundamental reason why we changed is that mentally handicapped persons made it very clear they found the name of our Association offensive, because of the "mentally retarded" label. In fact, handicapped persons pleaded that a new name should avoid any labelling but focus on our goals and objectives. Members at the Special General Meeting argued that the new name respect those fundamental wishes."

It is well that the name of the Foundation avoided labels. No one has ever found reason to wish it to be altered in any way.

Our effort in the field, due to the rules laid down at the very outset in our letters patent of incorporation, has matched our resources, not precisely year by year, for that would not have been possible, but broadly and sensibly. We have lived within our means. At December 31, 1984, by an extraordinary effort the Foundation attained its goal of \$2 million in our capital fund. This formidable achievement was greeted with great rejoicing throughout the Rite. How could the conclusion of the first twenty years of the Foundation have been more appropriately celebrated? We have built a healthy present; we have at the same time built an assured future and continued growth. Our effort has steadily expanded; it will not falter now.

It has been good for the Scottish Rite in Canada to have set a goal outside itself. The Foundation is an expression of true Masonic charity. Sometimes Masonic benevolence appears to outsiders to be intended for the benefit of Masons. No Mason'as such has been the recipient of benefit from the Foundation. It labours for the benefit of all Canadians, regardless of race, language or creed. It hopes that the benefits of the research it has generated will extend beyond Canada's borders. Those supporting the Foundation are engaged in pure charity without any trace of self-interest.

The acknowledgments have been many and gratifying. It is intensely satisfying to find our support acknowledged in both official languages.

Much has been achieved. Much remains to be done. The end is not in sight. Useful work without limit awaits the efforts of our hands and hearts. Perhaps our work is scarcely begun; but enough has been accomplished to strengthen our confidence and our courage. The future is bright with hope and challenge. Whether or not we as individuals shall have the privilege of seeing them, we are confident that supporters of our Foundation will one day witness and help to produce miracles of healing in the field of mental retardation. May their verdict on us and our efforts be, "Providence being their guide, they builded better than they knew".

Directors and Officers of the Foundation at December 31, 1984

Directors:

R.W. Austin G.L. Bennett L.H. Bergstrom D.M. Fleming J.V. Lawer N.M. MacLean W.C. McDonald W.H. Mortlock N.R. Richards C.A. Sankey I.D. Steeves

Elected Officers:

R.W. Austin, President N.R. Richards, Vice-President J.V. Lawer, Secretary D.M. Fleming, Treasurer

Appointed Officers:

J.C. Allan, Assistant Secretary J.W. Lowry, Assistant Treasurer

Awards Committee:

Dr. N.R. Richards, Chairman Dr. C.A. Sankey Dr. K. Haka-Ikse Jacques Pelletier R.G. Loftus D.M. Fleming

APPENDIX 1

SPEECH BY DONALD K. MacPHERSON TO SCOTTISH RITE CHARITABLE FOUNDATION OF CANADA — ANNUAL MEETING, SEPTEMBER 10, 1976 AT QU'APPELLE ROOM, HOTEL SASKATCHEWAN.

Just about ten years ago, there were two things that happened which related to the mentally retarded in Canada. One of these events was of great significance and importance — the other of a great deal less — being my election to the National Board of the Canadian Association for the Mentally Retarded — CAMR. The other event was the establishment of the Scottish Rite Charitable Foundation of Canada.

First, I would like to give you a brief summary of my ten years — and I hope you will not think I am immodest in doing so — because I freely acknowledge that there are literally hundreds — if not thousands — of volunteers in this movement who have, over that period of time, done far more for the mentally retarded than I could ever have hoped to have done. For eight of those ten years, I served on the National Executive Committee — two years as First Vice-President — two years as National President — two years as Immediate Past-President. And for the past couple of years, I have been Chairman of the National ComServ Committee, and I simply cannot take the time to tell you what that involves. Over those years, I experienced a lot of frustration — but also a lot of satisfaction — because I saw a very dramatic change develop in the methods of dealing with the mentally retarded — and more important — the public attitudes toward the mentally retarded. For the mentally retarded there has been, in my view, truly remarkable progress in the last decade. But I can say to you with complete honesty that if my impact on the progress of the mentally retarded over the past ten years has been even 1% of the impact created by the accomplishments of the Scottish Rite Charitable Foundation of Canada, then I could say to myself and to you also with complete honesty that I have done more for the mentally retarded in this country than any other single person over the past ten years, and of course that is not so.

Over these ten years, only because of the Scottish Rite Foundation, there have been 162 highly intelligent and capable young people in this country who have taken postgraduate and other special courses directly related to the cause of the mentally retarded and there is simply no way to accurately measure the truly tremendous impact they have had on improving the lot of the mentally retarded in this country. Unquestionably, the progress we have seen in the past ten years would not have occurred without them. Without ques-

tion, their intelligence — their concern — their industry — has made possible this remarkable progress we have seen in the past decade.

The injection of 162 people of this calibre into the Canadian community could not possibly have resulted in anything but remarkable progress for those people with whom they are primarily concerned.

We only wish it could have been 562 such people — or 1,062 such people — because although we have made great progress, we have still only scratched the surface.

But it is a magnificent scratch — and it is my great privilege to have the opportunity of commending you and thanking you on behalf of the some ½ million mentally handicapped persons in this country and their more than 2 million parents and close relatives — for in one way or another, you have made their lives better and happier.

It was about ten years ago that the Scottish Rite Charitable Foundation of Canada made its commitment to do something of a major nature — to overcome a major problem in this country — and to do it without seeking either glory or recognition. You learned there were some 1 million children in this country who were struggling with serious handicaps — and who required special help to overcome their disabilities — but who, if they had that help, conceivably could realize their potential and develop into happy and productive citizens.

You concluded that if that many children need help, then surely the long-range answer lies in finding causes of their disabilities and then preventing those disabilities from occurring. You made your determination that you would make your investment in the value and power of those bright people in this country who are prepared to commit their talent, time and indeed their lives to learning and to solving, the problems of these million children.

In contrast with many other charitable efforts and voluntary bodies who direct their funds to activities and structures which are dramatic and highly visible the Scottish Rite Charitable Foundation of Canada determined to be one of those rare exceptions which would work quietly without fanfare and publicity and which chose to make their investment in young Canadian scholars through a program of research and study Awards in mental retardation and developmental disabilities. What you have done in the past ten years is one of the great — but unsung — accomplishments in the history of Canadian voluntary efforts.

Your Bursary Awards program has made it possible for 162 intelligent and capable young people in this country to do research and study in a broad range of specialized areas which include prevention, bio-medical studies, special education, psychology, vocational development and many others. This research and study has already brought immeasurable help to thousands of Canadians, but more important than this, as the research and study continues and is intensified — you will be bringing even greater immeasurable help to the future generations of this country.

And let me say this — what you are doing is not simply a matter of helping a large and disadvantaged minority in this country who need your help — you are also doing something that is very practical and very sensible from an economic point of view. And you may be helping your own children — grandchildren — great grandchildren — or mine — because the possibility of giving birth to a child of some kind of disability — a learning, emotional or physical disability — which could be slight, mild or severe — is present for all of us. These conditions have no respect for class, race or economic status. It can happen to your grandchildren — it can happen to mine — and regardless of who it happens to — the help is needed — and you are providing it.

I said that what you are doing makes good economic sense — and in this connection, let me give you some statistics recently published in the Financial Post.

Each year Canadian taxpayers pay out some 6 million dollars to keep approximately 650,000 fellow Canadians as non-productive members of society. These 650,000 are the mentally retarded of Canada — many of them are in Institutions — many for life.

It is a fact that over 50% of those Institutions need not be there. It is a further fact that it costs taxpayers of this country about 9 million dollars just to keep 20 people at \$7,500.00 per year in an Institution for 60 years.

Half of that 6 million dollars we spend annually in taxes to keep these people could make a very large percentage of them self-supporting members of our Canadian community. Leaving aside the humanitarian aspect it simply does not make economic sense to keep half of these people shut away, when, with proper training they could be self-supporting and even taxpaying members of our society.

The research and study which you make possible will also make possible the proper training of these people so they can go into society — so they will not be a burden to the taxpayers — and in my view, this is good business and it is also a wonderful expression of the

Christian attitude. It is truly a case of helping others to help themselves.

I think you know that your research and study Awards program is operated through the National Institute on Mental Retardation which, in effect, is the research, development and demonstration branch of the Canadian Association for the Mentally Retarded. We, in the Association, are proud of our National Institute and are proud that it has been chosen to conduct this very important program. Each year the program has been publicized throughout all Canadian Universities — in order to reach the best potential candidates — and in recent years, we have had more than 600 applicants from which to choose those who will receive the Bursary Awards.

There is an independent professional Examining Board which, when choosing recipients, applies a rigorous selection process based upon certain criteria which include:

- Academic excellence based upon performance
- Quality of research proposal
- Relevance of course of studies to the current and future needs of mental retardation and developmentally disabled.
- A proven commitment to the field of mental retardation or a closely related field.
- Financial need.
- And satisfactory evidence of the recipient having a future career in this field and in Canada.

There are three types of Bursaries which are awarded — and they go by the unexciting — and prosaic — designations of Type A, Type B and Type C.

The Type A Award offers one year of financial support ranging from \$1,000.00 to \$6,000.00, plus a short-term period of orientation training at our National Institute. This Award is made to outstanding students entering or already engaged in graduate studies at a Canadian University and who plan a career either directly in mental retardation or in an associated professional field. The criteria which I mentioned earlier, apply to all three types of Awards.

The Type A Award is similar — but is for a longer period — and covers a two-year program with an optional third year of support. The Award is \$1,000.00 per year and includes attendance at two training symposia at our National Institute.

The Type C Award is relatively new and like the Type B Award has been made possible by the increased funding which has been made available by your Foundation. This Award combines the aspects of research which are common to the first two types, but takes it a step further in emphasizing research application and professional leadership development. The candidate here need not be in fulltime graduate studies but should be involved in the application of research in direct services or in training programs. There is an acute need in this country — and particularly in the field in which we are concerned — to develop candidates who will effect change, who will advance new concepts and ideologies and who will serve as catalysts between research on the one hand and program implementation on the other, and the Type C Award is especially directed toward this need.

I am afraid that reciting this kind of summary sounds rather unexciting — rather dull — and pedantic. But what these Awards are accomplishing is not dull — is not unexciting — and is certainly not pedantic. In my relatively brief association with CAMR, the developments I have seen have indeed been exciting. Ten years ago, I was taught — and I believed — that the ideal home for the mentally retarded person was an Institution — preferably a large one — located on the edge of town or in some remote area with gleaming white walls — with properly uniformed staff — which would be inhabited only by mentally retarded persons — and which probably had a high wall or a high chain-link fence around it. I believed that the ideal school for the mentally retarded child was a school attended only by mentally retarded children — a segregated school. I believed that the proper work setting for a mentally retarded person, assuming some of them were capable of doing some work, was a sheltered workshop attended only by other mentally retarded people — a segregated workshop.

But then some people started to ask questions. Was it good for the mentally retarded to be segregated from the rest of society? Was it good for society to have them segregated? Do the retarded really have the opportunity of reaching their full potential when they are segregated from the rest of society? And the people asking these questions quickly concluded that the answer to each of these questions was a resounding NO.

And we began to realize society had developed a double standard — one for the normal people and another for the retarded. The normal people have the right to an education — which gives them the right to develop their full potential. But the only right of the mentally retarded was a segregated life — which held no future — with little hope — and virtually no opportunity. Their only hope was to end up

in an Institution — and we began to realize that a retarded person virtually never graduated from that Institution.

And in a surprisingly short period of time, the entire approach to solving the problems of the retarded changed from segregation and exclusion from society to integration and normalization. This means that every retarded person has the right to lead as normal a life as he possibly can — and this in turn means that every retarded person has the right to the kind of training and kind of education which will give him the opportunity of leading as normal a life as he possibly can.

This means getting the retarded out of the Institutions and into homes — group homes — within the community. It means giving the retarded the proper training and experience so that he can perform and hold jobs in industry and in business because it has been proven that with the proper training and education, most of them are quite capable of this. And it means that retarded children should be attending classes at regular schools where they can associate with normal children — because it has been proven beyond any doubt that they develop far faster and much further when they regularly associate with normal children than they can ever hope to do in the segregated school.

But accomplishing these things is an enormous task — a task we have just barely begun — a task that we will never accomplish — until we have far, far more of the kind of intelligent, trained and dedicated people who are the recipients of your Scottish Rite Awards. These people have played a very large part in making possible the very promising beginning that we have seen — but again I emphasize we have seen only the beginning.

And let us consider for a moment the other major area — probably the most important area — where a tremendous effort is needed — and that is in the field of prevention. To this point in time, I believe that scientists have identified some 200 causes of mental retardation and developmental handicaps — but they have found solutions to only about half a dozen of these causes. This country needs — the world needs — more and more people with the kind of sophisticated education and training which will make it possible for them to attack and find the solutions to the remaining 194 causes. There is much to be done and there are so few people capable of doing that which needs to be done.

We are entering an era of highly sophisticated and complex programing for the mentally retarded and for all handicapped persons. We have succeeded in relieving some of the obvious neglect — but

we have a long way to go — and of course, we have not solved the real problem of mental retardation.

We are also facing a rather strange anomaly. I mentioned that researchers have found solutions to about six causes of mental retardation. The results of this research are now being applied in an increasing number of cases — and this has meant that in a large number of instances, mental retardation in a baby has been prevented. So in that respect, there has been a reduction in the number of retarded children.

On the other hand, — however — we find that the other side of medical science has also advanced and the application of this new knowledge has enabled any number of babies who are born handicapped and who would not formerly have lived to achieve a normal lifespan. We suspect that at the present time the second factor outweighs the first — and that as a consequence, the actual numbers of developmentally handicapped persons who require help, is on the increase. We believe this is a temporary thing and as we learn more about prevention, more about early detection and more about early treatment and as this knowledge is applied we will then see a reversal of that situation — and gradually at first — we will see a net reduction in the incidence of mental retardation. And, gentlemen, I cannot impress on you too strongly how important to this overall goal is the Bursary Awards program of your Foundation. In sheer numbers, the field which you are supporting far exceeds any other area of human need in this country. The impact of your effort has already been remarkable — because you have concentrated that effort in one field — which affects hundreds of thousands of Canadians — and particularly, Canadian children.

For what the Scottish Rite Charitable Foundation of Canada has done — what it is doing — and for what it will continue to do — I thank you most genuinely on behalf of CAMR — and although it may be somewhat presumptuous for me to do so — I also thank you on behalf of Canada's 650,000 mentally retarded — and on behalf of their over one million parents — and assuming each retarded person has at least one and one-half brothers and sisters — I thank you on their behalf as well. And gentlemen — that totals over three million thank yous.

APPENDIX 2

Investment in Talent-Bridge To Progress

Address to the Scottish Rite Charitable Foundation of Canada; Halifax, Nov. 26, 1977

G. Allan Roeher*

More than a decade ago, a small but dynamic and dedicated group of your members acted to create the Scottish Rite Charitable Foundation of Canada, and dedicated its work to making a better life for those who are deprived of equal opportunity to enjoy and succeed in life. After considerable investigation of needs, they decided on helping the largest group of disadvantaged citizens in our country mentally retarded persons. From modest and small beginnings the Scottish Rite efforts have made one of the most remarkable contributions in the annals of our history of voluntary effort. It was my privilege to work with that small group from the beginning, and it is an even greater privilege for me to be involved here to commend and thank you for your work on behalf of some half million people in this country, and their more than two million parents and close friends whose lives you have in one way or another made better and happier. Your membership decided to support an area of need which few voluntary bodies are prepared to take on. At a time when the vast majority of charitable effort and voluntary funds were being channeled into the more dramatic "bricks and mortar" type of activities which offer more visibility — you made a longterm commitment to do something which was less visible and dramatic, but over time would overcome a major human problem in this country — and furthermore, you chose to do it without fanfare, publicity or public recognition. Your Foundation looked for facts about which needs were the most critical.

At that time a major national study of needs among Canadian children was underway. It was published under the title of "One Million Children", and it concluded that at any one time there are a million children in this country struggling with the effects of serious handicapping conditions, and who require specialized help to overcome their disabilities and to realize their potential for developing into happy and productive citizens. Your founding members concluded that if so many children needed help, the long range answer lay in finding the causes of their disabilities, and then working toward ameliorating the effects and ultimately to preventing the problem.

^{*}Executive Vice-President, Canadian Association for the Mentally Retarded.

This could only come about through an understanding, belief and faith in the value of investing in the future, in the bright young, intellectually gifted people of this country — people who are in turn prepared to commit their talents and careers to research and study — to solve the problems of today and to prevent them in the future. The Scottish Rite Charitable Foundation of Canada has since been investing in young Canadian scholars through a program of Research and Study Awards in Mental Retardation and Associated Developmental Disabilities. The decision was a momentous and courageous one, for it is undoubtedly easier to appeal for funds for a visible need such as that presented by an individual child, a local service or program. However, it takes vision and foresight to recognize that a long-term investment is the only ultimately effective means to get at the real issues which face the handicapped. This helps our present generation, but will reap greater benefits for our children whose own children may as a result not be faced with the problem, if preventative measures are found. Our present generation of the handicapped are already benefiting from the cumulative effects of more than a decade of steady growth and development of knowledge and training, as a result of the support of your Foundation. In fact, what has been accomplished in the last 11 years is one of the great — but unsung accomplishments in the history of Canadian voluntary effort. Your work is helping a large and disadvantaged minority group. You are also doing something which reaches beyond altruistic motives something that is practical in terms of your own lives and those of your children, grandchildren and future generations. Let me explain. The possibility of giving birth to a child who will have some kind of learning, emotional or physical disability, slight, mild or severe is present for all of us here. These conditions have no respect for class, race or economic status. It can happen to your grandchildren or mine. Your efforts and investment now, in developing promising young talent, helps reduce the chances of defect occurring in the future.

To appreciate developments of the last eleven years it is necessary to take a brief look at the not so distant past. Until fairly recently mentally retarded people were neglected and abused, viewed as menaces, objects of ridicule and pity. Society's response was to isolate them in vast institutions, denying them their human and civil rights. The focus was always on the handicap rather than the person; the limitations and negative features rather than the human potential and positive qualities.

There are still over 15,000 Canadian citizens shut away in institutions — many for life. It is both inhumane and costly. It costs taxpayers \$9 million just to keep 20 people at \$7,500 per year in an institution for sixty years. It simply does not make economic sense — let

alone the humanitarian aspect of the situation — when at least half of these people could with training, be partially or even completely self-supporting and even tax-paying members of society. The research and training support which your organization makes possible is a key factor in preparing the way for the mentally retarded to enter fully into our society so that they will not be a burden to the taxpayer.

Also, as a result, public attitudes have gradually undergone change because of enlightened knowledge resulting from research and study of the problem. Research not only helps in terms of treatment and prevention, but has also in creating new attitudes so that the handicapped are given a better break in life.

Emerging new concepts and changing social philosophies have brought us to a point when services to the handicapped and their families are considered a basic right rather than a privilege or the result of charitable impulse. The cruel and inhumane treatment of the past is now more rarely seen, as it is gradually being replaced by the recognition that special support services, treatment, training and education can prepare young retarded children to take their rightful place in the community. Since 1968 notable and dramatic changes have occurred in such areas as education — increasing numbers of children once considered unable to learn are being educated in public and special schools. Retarded adults once considered unemployable are working in the competitive job market. The so-called severely retarded are now known to be capable of self care and attending activity centres and sheltered workshops. Three year-olds are attending pre-school programs to prepare them to enter the school system. Retarded people are beginning the long trek back into the community from the institutions, handicapped children are growing up with their families, progressing through the school system, acquiring basic work skills, using public transportation and recreational facilities. This is indeed progress and there is no doubt that this level of progress could not have occurred without your efforts and support. It is no mere coincidence that these accelerated levels of change have all occurred since 1966. Many of these developments can be directly attributed to the injection of more than 200 highly intelligent and capable young people into the Canadian community who by virtue of financial support and encouragement received from your Foundation have been provided with the means to take postgraduate and other special courses related to mental retardation. While there is no way to accurately measure their impact on improving the lives of mentally retarded people — the progress I have referred to so briefly, could not have happened without them. The Bursary program was initiated at a time of critical need in the field of human services in Canada — when few Canadian students were being encouraged to pursue advanced or specialized studies related to mental retardation and other handicapping conditions — to prepare for future careers in the field. Insufficient financial resources, a lack of interest and awareness of the problem in the universities, and minimal research activity contributed to the situation. At that time improvements hinged upon influencing and stimulating the quality and breadth of research and training at the university level. Your Research Awards program was aimed at encouraging students to enter into mental retardation research and studies, and to prepare them for the training of future researchers. Each member of the Scottish Rite Charitable Foundation can take pride in the growth of this unique program. Unique because to my knowledge, today it is still the only organization which supports graduate research in this way. Since the program's inception, an unprecedented growth rate has been achieved in terms of the increasing numbers receiving awards annually. The program has become a highly significant factor to overall developments in this area of human need. More than 200 students reaching into every province of Canada have received support for a wide range of studies covering many disciplines, including the physical, social, pure and applied sciences as well as the practical application of the humanities; and even more significant, the benefits of their work will be realized far beyond mental retardation, including other forms of handicap such as crippled children, those with learning disabilities, emotional disorders and other handicapping conditions.

The story about benefits doesn't stop there. We are all aware that there have been great strides in expanding the knowledge about learning in general — about how all of us learn; about how our normal children learn, and this has led to our educational system being able to teach complex subjects earlier and with greater effectiveness than when I went to school — one example is the development of techniques for intelligence testing. The many complaints about today's education cannot take away from the real progress in knowledge about learning. Where did that knowledge come from? Well, much of it came from research and experience in working with handicapped children. Because the learning problem is more obvious in the handicapped child, this is where the researcher begins and the new-found knowledge is valuable to all educational problems. What you do for the handicapped, you also do for all children in one way or another. The record of many former award recipients demonstrates that significant benefits have already accrued to the field. Many are working in universities, research centres, direct services to the handicapped, and in the training and preparation of a new generation of students. One example fairly close to home, is Michael Kendrick, a Halifax resident, who received a Scottish Rite award in 1976

to enable him to complete graduate studies at Dalhousie University. He is now the Atlantic Region representative for the CAMR and spearheading overall developments in the Atlantic region in key program and training area.

Others have been research students in your own Atlantic Research Centre on mental retardation, of which your province should be very proud.

Increasing financial support from the Foundation has made it possible to broaden the scope of the awards program to adapt it to meet changing and increasing demands of new service directions. Three categories of awards are now being offered and are designed to reach a wide range of candidates. The funds are allotted to the training and preparation of researchers and clinicians. The ultimate value of research is lost if we do not prepare those who can apply the knowledge — to this end the increased funds have made it possible to include a vitally important training component to the program. Selected candidates receive specialized technical and advanced training to prepare them for leadership roles in various areas of program development. This new award has served a need to develop candidates who can effect change, advance concepts and apply the new knowledge thus serving as the link between research and practice. In comparison with eleven years ago the quality and breadth of research and training in universities in Canada has vastly improved, primarily due to the growing number of Scottish Rite Bursary recipients.

If we can look to the past with a sense of accomplishment what about the future? How far have we to go to help those who are with us? We are dealing with the problem of the perennial ice-berg. Only the tip of it represents solutions. What's underwater are the problems which must be solved. The task of getting the retarded out of the institutions and into homes and the community still faces us. The task of providing them with the proper training and support, so that they can hold jobs in industry and commerce is enormous. Research has shown that with the right training most have the capabilities for this. Research in early childhood development has shown beyond doubt that retarded children develop far faster and much further when they regularly associate with normal children, when they are given the proper and an early start in life — right from the time of birth. The greatest challenge which lies ahead is that of prevention of the problem itself. At this point in time scientific knowledge has enabled the identification of approximately 200 causes of mental retardation and developmental handicap. Solutions and treatment have been developed for only half a dozen of these 200 causes. We are now able to detect mental retardation at the early infant stage, rather than at age 6, 7, or 8 years.

However, we are also facing a strange dilemma — while some forms of handicap are decreasing due to new diagnostic and treatment techniques - the advances in medical science now enable handicapped babies who would not formerly have lived to now achieve a normal lifespan. As a consequence, this means that actual numbers of developmentally handicapped children are as yet on the increase. As we learn more about prevention, more about early detection and treatment we will gradually see a reversal of this situation — and a slow but gradual reversal of mental retardation. Many of today's accomplishments considerable as they undoubtedly are, are still directed to dealing with the disorder after it occurs leaving aside the real question of what can be done to prevent it. The ultimate programme for mental retardation is prevention and this rests solely with continued research and the preparation of more people with the required sophistication, education and training to prepare for research careers. The Research and Awards program has built the foundation for mental retardation research in Canada. The impact of your efforts has been truly remarkable — primarily because your resources have been concentrated in a field which affects thousands of Canadians and at least one million children.

For what the Scottish Rite has done — what it is continuing to do — I thank you on behalf of the CAMR — and on behalf of all those whose interests we represent. The world is a better place because of you, and because of the technical young talent you are supporting. And because of this, future generations will benefit and you will leave a monument to society which will never fade.

APPENDIX 3

THE SCOTTISH RITE CHARITABLE FOUNDATION OF CANADA

Report of the Vice-President and Chairman of the Awards Committee 1981

At a meeting of the Directors held at Winnipeg, Manitoba September 9th, 1980 and following a report by the writer (since published and distributed to the membership with the President's memorandum of December 31, 1980), it was approved that an Awards Committee be established to review submissions for financial assistance for Canadian research projects in the field of mental retardation and make firm recommendations to the President for action. A sum not to exceed \$100,000 was allocated for distribution during the year, this to come from monies contributed by our Foundation through the Canadian Association for the Mentally Retarded into a segregated fund controlled by the C.A.M.R. (Our business dealings are normally with the National Institute for Mental Retardation. This is sponsored by the C.A.M.R. and is responsible to the C.A.M.R. Board of Directors). Payments of grants recommended by the Awards Committee required approval by our President to the C.A.M.R. -N.I.M.R. Each award would include the prospect, assuming progress satisfactory to the Awards Committee, of annual renewal for up to three vears.

These major awards constituted a significant expansion of the work of our Foundation. They were not intended to reduce the bursary program previously developed and administered by the N.I.M.R. from funds in hand contributed by our Foundation.

Members of the Awards Committee were Dr. K. Haka-Ikse of the Hospital for Sick Children, Toronto (representing the Canadian Paediatric Association), Dr. Hugh Lafave, Executive Vice-President of the C.A.M.R. and the N.I.M.R., and three members of our Board, Messrs. Lyle H. Bergstrom, Donald M. Fleming, and the writer as Chairman.

Twelve applications were received from all across Canada. Each received careful and critical consideration, and each had substantive merit. The Committee selected four of the twelve (not an easy task) for grants. Three of these involved payment at the turn of the year. The fourth was paid in June of this year. In addition, the N.I.M.R. who were, through Dr. Lafave, aware of the details of all applications, gave four bursaries to post-graduate students from institutions which did not receive a major award but who were associated with projects considered by the Awards Committee. In another case, support was given by the N.I.M.R. to a professor on sabbatical leave during which he would improve his expertise to deal with a project with which the Committee was favourably impressed and which may well (depending on the circumstances at the time) be considered for a major award a year from now.

Each award was conditional on submission of semi-annual and final reports to the Foundation. Publication of research results in line with the normal practice of the Institution was expected and this would be accompanied by an acknowledgement of financial support by our Foundation.

The objective and present status of each of the four projects now assisted by major awards are as follows:—

1. Atlantic Research Centre for Mental Retardation, Halifax, N.S. Dr. Matthew W. Spence and associates "Prenatal and Perinatal care and mental handicap."

The Community Reproductive Care Program, recently inauguarated in Nova Scotia, involves the N.S. Government Department of Health, several departments of Dalhousie University, the N.S. Medical Society, maternity and paediatric hospitals and various Associations. It is trying to ascertain the effect of improved maternity care (medical advice during pregnancy; better nutrition; cessation from cigarettes, alcohol and non-prescription drugs; greater help and rest at home; diagnosis and management of "high risk" pregnancies). Data are being compiled on some 11,000 births. One measure of "success" would be a reduction in the percentage of babies with a birth weight of less than 2500 grams. Underweight liveborns are thought to be particularly likely to be mentally or physically disadvantaged (or both). Dr. Spence and his associates have become fully associated with this program and propose a detailed scrutiny of cases involving any significant MR (including follow up after birth) and, hence, correlate prenatal and perinatal care with causes and possible prevention of MR.

A progress report from Dr. Spence last month indicates that the project is now fully organized, that his Centre has employed Mrs. Margaret Brown to devote full time to this work and that everything is now set to go.

It is of interest that Mrs. Brown had had a N.I.M.R. bursary during her graduate studies. She is a native of Halifax, a Registered Nurse, an honours graduate (B.Sc.) in Psychology and has just completed her M.A. in Special Education at the University of Saskatchewan. Dr. Spence held up the appointment of his project coordinator until Mrs. Brown was available. (The writer concurs, - reasonable delay is strongly advisable in research projects to get the right person.)

The Awards Committee designated a grant of \$25,000 for 1 year and reservation of a further \$25,000 if required and subsequently approved for a 2nd year. Due to the delay in Mrs. Brown being available, Dr. Spence advises that the \$25,000 will be adequate for the current year. He suggests that an additional sum be reserved to cover Mrs. Brown's salary during the summer of 1982 should the project be continuing on a productive basis. No new funds are required now. The Awards Committee will follow this important project and will have recommendations for future action in due course.

2. The University of British Columbia, Vancouver, B.C. Dr. Patricia Baird and associates "Study of the marker X-Chromosome associated with X-linked Mental Retardation."

In the writer's report last year reference was made to new knowledge that a particular X-linked (that is, male-linked) chromosome in human DNA appeared to be closely associated with MR of otherwise unknown origin in males, and might even account for the excess of mentally disadvantaged males over females. Research on the identification, diagnosis and functioning of this genetic abnormality is very important and is active in many centres including at least 4 in Canada, and there may well be more. In supporting Dr. Beard's research, the Foundation is genuinely assisting one of several basic fundamental approaches in this regard. Naturally, we will be especially pleased if a valuable contribution comes from the group at U.B.C. As a Foundation we will welcome and applaud good work wherever and whenever done.

With the object of clarifying the correlation of this chromosome with MR the study deals with the prenatal and carrier status of the X-linked chromosome in amniotic cells from womb fluid for both normal and "at risk" pregnancies. A progress report from Dr. Dill indicates:—

- (1) Details are given of a modification in making cultures which yields better cell growth and in shorter time (3 days vs 4). This has been successfully tried out on both male and female carriers from 3 families with this type of MR. The new technique also may have advantages in testing womb fluid cell cultures for other purposes.
- (2) As a base for comparisons, frequency of the X-marker is needed to be established in normal individuals. Data are being compiled by 10-20 individuals per week depending on the number of amniocenteses (withdrawal of womb fluid) performed and availability of parental blood samples. Some 100 control samples were on hand when Dr. Dill reported. He writes: "We feel that the control aspect of the project is now well established and should provide us with extremely valuable data which is not presently available."
- (3) Development of a prenatal test (based on womb fluid) for X-linked MR is a major objective. The group are now in a position to begin systematic testing of cultures. There will, of course, be further work on improving techniques.
- (4) Some evidence is accumulating from the studies that female carriers yield a culture in which a critical satellite on the marker chromosome is deleted. It is obviously important to verify or disprove this.

The Awards Committee had recommended a grant of \$25,000 per year for three years, assuming reasonable progress and continuing potential. It is obvious that a good start has been made. The Committee will have further recommendations in due course.

3. The University of Calgary, Calgary, Alberta
Dr. Noreen Rudd and associates
"Assessment of genetic screening techniques in the prevention
of mental retardation."

The objective is to find alternative procedures to those requiring examination of womb fluid for predication of risk of MR in offspring. The hope is to be able to spot "at risk" individual fathers or mothers preconceptually or prenatally by finding some hypersensitivity indication through blood tests, semen tests etc.

There were, regrettably, delays in getting money to the University and then further delays at the University in space allocation, in assembling apparatus and in buying a microscope. A technician was hired to commence work only towards the end of May and only 4 weeks of preliminary experimentation were done before the interim report. Dr. Rudd writes: "However, things are now well underway and we look forward to a productive future."

The initial experiments looked towards finding an efficient and reliable technique for measuring two specific abnormalities in cultures using venous blood, fetal calf serum and appropriate additives. This work is proceeding.

The Awards Committee recommended a grant of \$25,000 per year for 3 years subject to progress and continuing potential. Because of the delays, Dr. Rudd asks that the starting date of the grant be taken as March 1st, 1981. This is acceptable subject to up-to-date information being available in the future for proper reporting to the Foundation during its annual meetings in September and the time factors to allow the Awards Committee to take considered action.

Further funding will not be required before March 1st, 1982. The Awards Committee will make recommendations when further information is at hand.

4. McGill University, Montreal
Dr. Abby Lippman-Hand and associates
"Genetic epidemiology of Down's Syndrome and
Neural Tube defects."

This award was approved in late May and payment made in June. There had been four proposals from McGill for consideration by the Awards Committee and further clarification was desired before making a preferred selection. After consultation between the writer and the Dean, Dr. Leonard Pinsky, the Committee agreed, by correspondence, to approve a grant of \$25,000 to Dr. Lippman-Hand with prospect for two further annual grants subject to Committee approval.

Dr. Lippman-Hand's work on Down's Syndrome has led to the conclusion that the "known" greater risk in children of older mothers may

be due not to conception at a later age but to younger mothers carrying a Down's fetus having more frequent miscarriage. Dr. Lippman-hand writes: "We are beginning to explore the implications of this finding, since it may mean that high risk women are not only those who conceive such fetuses, but also those who cannot select against them in utero."

In her study of both Down's Syndrome and Neural Tube defects (spinal bifida) data are being analysed from all cases born in Montreal from 1977 through 1980. Hospital data have been gathered on N.T.D. from the entire Province. There has been a marked decrease, currently 1.8 per 1000 births down from 3.3 per 1000 in 1961-65. The obvious question is why? Work will include demographic factors centering in Quebec City.

The Foundation will welcome the news that Dr. Lippman-Hand has been given a 5-year National Health Scholar Award as of July 1st last. We look forward to our association with her and her work.

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Our awards have attracted Canada-wide attention. We have a further application from the University of British Columbia related to their MR child activity program, submission of a very extensive program at the University of Saskatchewan which Mr. Bergstrom has reviewed and from which a portion or portions may be divided out and require serious consideration by the Committee, and a potential from Queen's University on another aspect of the X-chromosome work. An application from McMaster University last year was deferred until their Dr. Whelan returns from sabbatical leave in England. The Committee was impressed by the prospects and this application remains in the active list. We anticipate updates on some applications which did not receive awards last year. One fall out from our program is an increasing recognition by Canadian researchers of the work of their compatriots in other Canadian centres. Lines of communication can be established which can be of real value.

The writer has, for presentation to the Directors, a statement from Mr. Jacques Pelletier, Director N.I.M.R., as to the status of "Scottish Rite Funds presently held by the N.I.M.R." in their "Designated Bursary Fund Account." This will be reviewed for a projected program of both renewed and new awards during the coming year, in the light of expected donations. There is no question but that our program can be expanded to assist new projects of promise and potential.

The Board is aware of administrative changes at N.I.M.R. during the past year. The writer reports good communication and rapport with Dr. Lafave and with Mr. Pelletier. We can look forward to full cooperation in the future.

The thanks of the Foundation are due to and have been earned by the "external" members of the Awards Committee. Dr. Haka-Ikse has

generously contributed her technical expertise and familiarity in the field and her help has been invaluable. Dr. Lafave, both on Committee and at the N.I.M.R., has been, and continues to be, most helpful. The writer strongly recommends that the present Committee be asked to continue, with possibly one new member added. (for info. Dr. N. R. Richards will be added to the committee).

The writer was invited to speak at a dinner before a degree at Murton Lodge of Perfection, Hamilton and to address the Brethren at the beginning of the Spring Reunion of Ottawa Consistory. In each case a welcome donation to the Foundation was received.

The writer will attend the National Conference on Mental Retardation in Quebec City October 28 - November 1 next. Mr. Pelletier has proposed that a brief speech about the Foundation with presentation of an envelope representing our 1981 donation of \$137,000 would be at the principal luncheon and that he would make a suitable acknowledgement. The good relations and good publicity of such a procedure is obvious. There will also be an opportunity to meet delegates from all over Canada.

The writer is reasonably satisfied with progress made during the past year, especially so as it was a year of beginnings. Some projects have not advanced as fast as would be desired, but the overall picture is good and under control. As an old hand in research, the writer reminds the Directors and the Members that they must never expect miracles. There will be both successes and failures in the researches being supported. The projects in hand and in prospect will advance our knowledge and so assist in reducing mental retardation. That is what Foundation dollars are for. It is the writer's judgment that the membership will get a good run for their money.

All of which is respectfully submitted.

CHARLES A. SANKEY, Vice-President.

APPENDIX 4

THE SCOTTISH RITE CHARITABLE FOUNDATION OF CANADA

Report of the Vice-President and Chairman of the Awards Committee 1982

As approved by, and subsequently reported to the Directors, the writer attended the National Conference of the Canadian Association for the Mentally Retarded in Quebec City, October 28 - November 1, 1981 and presented to Mr. Paul Mercure, President C.A.M.R., at an official luncheon on October 30 an envelope representing our contribution of \$137,000 to the C.A.M.R. The proceedings were, of course, bilingual. The writer was introduced by Mr. Jacques Pelletier and thanked by Mr. Mercure. There was an opportunity to speak for 5-10 minutes and say something about our Foundation and about the Scottish Rite. It did not do a bit of harm to be able to say that I had joined the Scottish Rite in Quebec City and that I had, several years later, received my 33° in the same room where the luncheon was being held, the Salle de Bal of the Chateau Frontenac.

The Conference was primarily a group of workshops with a principal drive towards effecting integration of the handicapped, getting them out of Institutions and into society as much as possible. For the writer, a main result was a realization (as distinct from a previous general recognition) of the intensity of the frustrations of all parties personally concerned with the mentally retarded:— the parents, the professionals, the government, the heads of institutions and, obviously, the handicapped. It is inevitable that there are areas of real bitterness, but there are also some remarkable success stories. The writer had an opportunity to meet several people who had been financially assisted by N.I.M.R. bursaries (from our funds) and to talk informally with those attending (including some handicapped). It is believed that the trip was well worth while.

Bursaries and awards approved by the N.I.M.R. committee were screened by the writer before final approval. The procedure was somewhat different this year as provincial associations were consulted in compiling the list of applicants for "bursaries" designated as not exceeding \$1,500 each. The writer approved such bursaries for:

Jacqueline Shea, Holland College, P.E.I.
Susan Gardiner, Masters program, Univ. of Calgary
Carmen Sandhoefner, Special Education, Univ. of B. C.
Jacqueline Pace, M.S.W. program, Sir Wilfrid Laurier Univ.
Janice Latimer, Masters program special Education,
Univ. of Saskatchewan

Catherine Coon, Masters program, Education, Univ. of Toronto Janice Light, Masters program, special Education, Univ. of Toronto Ronda Strain, Masters program, Univ. of Toronto

Monique Levesque-Lamontagne, Psychology, Univ. of Montreal Olivette Soucy-Gagnon, Masters program, Nursing and community health, Univ. of Montreal Elvy Robichaud, Masters program Psychology, Univ. of Moncton

Of the above, the first requires special comment. Miss Shea is taking a college course (equivalent to Ontario's CAAT colleges) for training as a worker in the M.R. field. There are 27 such colleges giving M.R. training courses in Canada at present. The writer consulted Gordon Bennett who agreed that this was a suitable case for "a flyer", no precedent involved, in giving some support to a potentially good future worker in the field. It is recognized that no "research" is involved. If we get a favourable result from this case the writer is recommending to the Board that a limited number of carefully screened applications can, in the future, receive similar modest bursaries. The recommendation includes the stipulation that one of our Directors or members in the vicinity be assigned to keep in touch with the student. The writer does not need to emphasize that a personal touch makes all the difference.

In addition to the above, a bursary was awarded to Ronald Givens, Master program, Psychology, York University. Mr. Givens' application had been grouped with more senior postgraduate workers (who received larger awards) and the recommended grant of \$1,500 fitted in with the "bursary" group.

Larger awards, normally for Doctoral students, were also cleared by the writer. As renewals of previous grants:

Patrice Karn, 2nd year Ph.D. student, Psychology, York Univ. \$6,000

Joanne Gardner, 2nd year Ph.D. student, Educational Psychology, U.B.C.—\$6,000

Judy Snow, Theology, U. of T.—\$6,000

Marcel Bouffard, 2nd year Ph.D. / student, Physical Education, U. of Alberta—\$4,000

Margaret Brown, studying for Ph.D., Educational Psychology, Atlantic Institution of Education—\$6,000

Denise Messmer, 2nd year student for Ph.D., Clinical Psychology, Concordia University—\$3,000

Connie Kushnir, 2nd year Ph.D. student, Psychology, York University—\$3,000

and, as new (1st time) grants:

Glen Davies, 1st year Ph.D. student, Clinical Psychology, U.B.C.—\$6,000

Frederick French, 2nd year Ph.D. student, Psychology, U. of Alberta—\$3,000

In each of the above the amounts are those previously recommended by the N.I.M.R. Committee. Two of these require special comment.

Miss Snow has been almost completely paralysed since birth. She can move only one thumb and operated from a specially designed wheel chair, motor equipped, started, stopped and steered by touch controls on the inside of a ring, in which she can manipulate her thumb. She has full power of speech and has graduated in Psychology and now instructs, especially with the handicapped, at York University. She has become convinced that spiritual values are of real importance to the handicapped and enrolled in Theology at U. of T. to further her background in this regard. The award covers tuition and an attendant. The writer is sure that all the members of our Foundation will concur that anything this remarkable and courageous woman does to further her usefulness is properly classified as "research" within our terms of reference. She will be speaking to the Toronto S.R. Bodies later this year.

Mrs. Brown has been working with Dr. Matthew Spence on our major project at the Atlantic Centre for Mental Retardation (see later). Her work on this is substantially finished and she will then be devoting full time to study for her Ph.D. She has an unusually broad background and has done excellent work. The award will be available when her assignment under our major project is completed.

The writer has files on all the recipients above and can supply this, by correspondence, if requested.

We now have six major research projects being assisted by significant financial awards, each approved by our Awards Committee and authorized by our President. The objectives and present status of each of these are as follows:—

1. Dr. Matthew W. Spence and associates, Atlantic Research Centre for Mental Retardation, Halifax, N.S.

Prenatal and Perinatal care and Mental Handicap.

This work has the objective of evaluating prenatal and perinatal care as this affects the incidence and character of mental retardation. This is being done by close participation in an extensive randomized controlled trial, supported politically and financially by the Nova Scotia govenment, involving screening 11,000 infants born in rural mainland Nova Scotia between January 1981 and January 1983, to study the effect of enhanced antinatal care. It is planned to screen these children at age 3½ for developmental disability during the period January 1984 to December 31, 1986. Special attention will be given to infants with low birth weight. Once MR is identified the child will be referred to a specialist for confirmation of any tentative diagnosis. Community rehab services will be available. Data will be evaluated as to particular type of MR and of MR flowing from any known specific cause.

Our grants have been used to help set up the very extensive planning and procedures required (questionnaires, instruction manuals, professional visits, data collection and methods of analyses, etc. etc.), and getting advice from consultants. The real payoff will come during the three years 1984-5-6.

Between \$600,000 and \$650,000 will be needed to finance the study during these three years. A research grant application has been submitted to the National Health Research Programs Directorate, Health & Welfare, Canada.

It will be seen that the scope and direction of this work has evolved and become very much broader. It is both proper and inevitable that there will be further modifications as the study proceeds. Dr. Spence writes, "I am really pleased at the progress to date. I think this can be an internationally acclaimed study with a major impact on the prevention of developmental disabilities."

Dr. Spence has enquired whether our Foundation would consider major support, say of the order of \$100,000 if necessary, during the upcoming active years. The answer will be in part conditioned by the Federal support made available and the other financial needs of the work at that time. There can be no question as to the relevance of the study to the objectives to which our research efforts are committed. Although further funding is not required at the moment, contact will be actively maintained and recommendation deemed appropriate made in due course to the Directors.

It is of added interest that the principal worker assigned during the now ending planning was Mrs. Margaret Brown whose studies for her Master's degree were supported by grants of the N.I.M.R. from our funds. Mrs. Brown is now starting work towards her Doctorate.

Grants towards this project to date:

1st grant \$ 25,000 2nd grant \$ 13,000 (amount requested) \$ 38,000

2. Dr. A. Lippman-Hand and associates, McGill University, Montreal Genetic Epidemiology of Down Syndrome and Neural Tube Defects.

Dr. Lippman-Hand is working on a fairly broad spectrum of pertinent work in these fields. As noted last year, she is, deservedly, the holder of a major National Health Scholar Award. She is using our grant for the salary of an assistant "who has provided invaluable assistance in gathering and analysing data" for computer charges, data analyses, publication expenses, manuscript preparation and the like. We thus have a piece of the action throughout all the work of one of the best researchers in the field in Canada.

It has been recognized for some time that mothers are more likely to have Down Syndrome children towards the end of their childbearing years. This has been shown by Dr. Lippman-Hand to be conditioned by a higher

tendancy for younger mothers carrying such a child to have a miscarriage (spontaneous abortion). The latter has recently been supported by her analyses indicating that the ratio of Down-fetus-miscarriages to Down-livebirths is lower for women over 35 than for younger women. If there were not a higher proportion of miscarriages in the younger group the ratio would have been constant.

The possibility that ultrasound measurement of fetal head shape could be used to identify a Down fetus was investigated. Data from Montreal and from Toronto on 309 control and 8 Down fetus did not establish any measurable difference. A paper will be published shortly.

A study of NTD and sex ratio (NDT = Neural Tube Defects = Spinal Bifida), principally with babies with substantially reduced brain tissue, has indicated that there is some factor which primarily affects female babies and another which affects both sexes equally. This is strong evidence of multiple causes for NTD. There are, also, familial trends in NTD, e.g., a woman who has had an NTD child has a 5% chance that a subsequent offspring will also be affected. A paper has been submitted to referees prior to publication.

A new study on vitamin supplementation and NTD, originating in the U.S., suggests that multi vitamin treatment, starting at least 28 days before conception and continuing well into pregnancy, can reduce the risk of at risk mothers of having an NDT child. Dr. Lippman-Hand is organizing a Canadian collaborative study to replace and expand this study. She has been invited to attend a conference of the (U.S.) Centres for Disease Control and the National Institutes of Health on this approach. The only "accurate" recurrence data available in Canada are in Quebec and in British Columbia. Dr. Lippman-Hand writes, "The importance of the question of prevention makes this a pressing issue."

Also on NTD, Government data from Quebec, which had indicated a substantial decrease in the proportion of NTD babies among total births, seem to be contradicted by Federal data. An attempt is being made to unraval the discrepancies and establish a generally acceptable conclusion.

A Ph.D. candidate, supervised by Dr. Lippman-Hand, proposes to study, "Maternal Reporting of Early Pregnancy Exposures" to learn from mothers' reports whether women delivered of children with malformations have had experiences which differ significantly from mothers delivered of normal children. Such a study is not simple, because of the natural desire of a woman who has had an abnormal child to find a reason (imaginary or otherwise) for "what went wrong." A protocol for this work is being developed.

Grants towards this project to date:

1st grant

\$ 25,000

3. Dr. J. Holden and associate, Queen's University, Kingston.

Identification of the DNA Marker closely linked to the Mutation(s) causing X-linked Mental Retardation.

This grant was initiated in December 1981. It is a "fundamental" study, the only one strictly of this kind among those we are supporting under our major grants. A "successful" outcome will not "prevent" anything, but will make feasible future work which could be very valuable. It is a type of work essential to a genuine understanding of the genetic bases of mental retardation.

The objective is to find a "genetic marker," that is something which can be specifically identified by known techniques, in human DNA, which will serve as a means of indicating the mutation responsible for X-linked M.R.

The method being used involves the use of "restriction" enzymes to separate recognizable parts of human DNA and linking these with clones from hamster cells with human X chromosome DNA. If a "tight" link is obtained, the odds are that the two belong together. This can than be tested out by classical methods of family analyses. An ultimately successful result could serve to identify X-fetuses during early pregnancy or, more important, identify female carriers preconceptually.

We are dealing with a genetic jigsaw puzzle in which we first have to select, in stages, pieces from a large collection which we think belong to the particular jigsawed picture we want to assemble, and then, in *that* picture, be able to usually recognize whenever we see it, even by itself, a special piece which completes an off-colour stone in a rainswept wall.

As a first stage, a library of DNA sequences has been constructed from human/hamster hybrid cells. From a preparation of some 4 million clones, about 2% contained the human X chromosome sequence. These were identified using radioactive phosphorous labelled total human DNA as a probe and from these two sets, one of 84 and the other of 85 (total 169), were selected for treatment and use in the second stage. This first stage is, in effect, the first stage of selecting the pieces we think we want for *our* picture.

In the second stage, now well advanced, the survivors of the first stage were purified and their DNA prepared. These DNAs were digested with each of two different restriction enzymes and fragments sorted as to whether these contained either repeat DNA sequences or unique human DNA sequences. Dr. Holden expects to end up with about 60 different sites on the X chromosome identifiable as to unique sequences. The techniques are sophisticated but known and are set out in Dr. Holden's most recent report. This is stage 2 of our pre-selection.

The third, next upcoming, stage is to identify sequences which differentiate the two X chromosomes in a known carrier mother. Selection of a particular family in the Kingston area has made, from among 27 families there, with known X chromosome problems. This family had, in 3

generations, 9 X retarded males, 4 known carrier females, 14 females whose carrier status is unknown as they have no retarded male offspring, and 10 unaffected males. All these are living and 3 members (2 male and 1 female) of an older generation are still alive. This family will provide the material for use in future work.

Grants towards this project to date:

1st grant \$ 27,000

4. Dr. D. Whelan and associates, McMaster University, Hamilton Inborn Errors in Metabolism: Organic Acidurias, an Investigation of Excretion Patterns in Infants and Adults.

This project, considered favourably by the Awards Committee over a year ago, was held up pending Dr. Whelan's return from a sabbatical leave in England where he was studying appropriate techniques for this work. Our sponsorship began about 6 weeks ago. A technician has been engaged, some equipment needed has been ordered and work is underway.

Certain organic acids tend to accumulate in the body as a result of genetic error. The soluble ones are excreted in the urine and can be identified by gas chromotography combined with mass spectroscopy by moderately sophisticated but available techniques. There are some 50-60 of these known "organic acidurias." It is proposed to complete reference data on such acids and correlate this with acids found in excreta in cases of known genetic error and extending the work to womb fluid organic acid patterns. The significance of a successful result to early diagnosis of genetic error will be obvious.

Grants towards this project to date:

1st grant \$ 27,500

Dr. Noreen L. Rudd and associates, The University of Calgary. Assessment of Genetic Screening Techniques in the Prevention of Mental Retardation.

This work has the objective of finding out if certain genetic screening techniques can, preconceptually, predict couples who are at risk of producing offspring with chomosome anomalies characteristic of genetically based MR.

Specifically, Dr. Rudd and her associates have been using two sophisticated techniques on blood leukocyte cells, one based on assays for micronuclei counting and the other on observed exchange of "sister chromatid" cells, using slides prepared with special techniques. Results are being correlated as between "normal" individuals and members of families with offspring (either living or as a result of miscarriage) with genetic abnormalities or where infertility is suspected as being due to the same cause (one way in which nature protects itself against the "undesirable").

Another aspect of the same problem involved the transmission of genetic MR by the genetically mentally retarded to *their* offspring. Facilities for sperm nuclear assay are available in Calgary under Dr. R. H. Martin who is associated with Dr. Rudd. Dr. Rudd writes that "The only place in the world capable of running this assay routinely" is under Dr. Martin. Obviously, maximum advantage should be taken of this.

Work was seriously delayed at the start until a competent trained technician was available and there was a further lapse of 3 months during the past year for the same reason. Progress has, therefore, been much slower than would be wished, but there has been progress. Also, on the favourable side, Dr. Rudd has enlisted help in getting suitable subjects in Toronto and in Halifax and is co-operating with other genetic centres.

On the micronuclei assay, tests are reported on 12 of 14 "normal" (control) samples and on 29 of 35 "patients." All of the higher tests are among the "patients," but "patient" tests cover a much wider range and go as low or lower than the lowest of the controls. Statistical analysis gives a "predictability rate of 59%," but the evidence seems to be that a high test is something of a danger signal, while a low test is no ground for any considered conclusion, either positive or negative. This would appear to be the basis for Dr. Rudd's statement that "The results are rather encouraging as they support our original hypothesis."

On the sister chromatid assays, 4 of 14 "normal" and 17 of 35 "patient" tests are reported. There is some tendency for higher tests among the "patients" but there is considerable variation and the present results provide no sound statistical basis for conclusions.

The work on sperm chromosomes appears to be unique and may develop into something important. Dr. Rudd's report encloses a paper now submitted for publication of the present state of a study with a 17 year old who has Down Syndrome ("Trisomy 21 Mosaicism"), in "excellent" general health, and whose genetic disability was only suspected at age 8 as part of a checkup for the cause of learning difficulties. There are 2 normal elder brothers and the family history is well documented. His potential for fertility is near the bottom of the "normal" range. Sperm karyotypes were obtained, with difficulty, by fertilization of hamster eggs. Two of thirteen were "abnormal" but neither of these had the extra number 21 chromosome of Down Syndrome. Study is continuing.

Dr. Rudd's work is just getting its teeth into establishing its potential.

Grants towards this project to date:

1st grant \$ 25,000 2nd grant \$27,000 \$ 52,500

6. Dr. Patricia A. Baird and associates, University of British Columbia, Vancouver

Study of the Marker X Chromosome associated with X-linked Mental Retardation.

This work had, as a first objective, effecting improvement in the methods previously used to detect the genetically defective X chromosome, especially prenatally in womb fluid and eventually to carrier mothers preconceptually. The particular chromosome is characterized by a "satellite" or kind of knob at one end, but the observation of these under the microscope following established culture techniques only occurred in perhaps 5% of the cases where it was actually present.

New techniques were studied and, at last report, one method yields positive results in one third of the cases, - a 6-7 fold improvement which is an important step forward.

There has also been a unique opportunity to examine fetal cells from an aborted fetus, the mother having already had 2 X chromosome defective male children. The marker was identified in the fetal tissues. This is the first such positive identification in Canada. Two other such identifications have just been reported in England.

Reference is made to a report by Dr. Dill (Dr. Baird's principal associate) in the last issue of The Supreme Councillor, which summarizes the status of this work very clearly.

"Normal" individuals have been, and are being tested as "control" data. To date some 380 individuals have been so screened and there has been no observation of the X chromosome. The "marker" is thus not at all common in the normal population.

Work is continuing on trying to develop a reliable prenatal test for X-linked retardation. A new staining technique, developed in the U.S., had been indicated as producing an unexpected apparent fusion in the chromosome at the fragile site. Work at U.B.C. now shows that this may be an artifact.

The writer was recently in Vancouver on holidays and took advantage of this to visit Dr. Baird. The group which she heads have just moved into larger and much improved quarters, - an indication of the value of their work by the University.

Grants towards this project to date:

1st grant 2nd grant	25,000 27,000
	\$ 52,500

In addition to the above, the Awards Committee approved a grant to Dr. I. Mendelson at the University of Saskatchewan. It is regretted that the appointment of Dr. Mendelson at the University was not renewed and the award was cancelled before any payments had been made.

The writer was invited to speak at the Spring Assembly of Windsor Lodge of Perfection. Their contribution to the Foundation is much appreciated. It has also been found, wherever the writer has been, that the work of our Foundation is more and more appreciated, not just within our Order but among others concerned with the whole problem of Mental Retardation. We have also helped to promote communication among research workers. The interrelation of problems is recognized and isolation reduced.

The thanks of the Foundation are especially due to Dr. Haka-Ikse of the Hospital for Sick Children (representing the Canadian Paediatric Association) and to Dr. Hugh Lafave, Executive V.P. of the N.I.M.R., as well as to our own members, L. H. Bergstrom, D. M. Fleming and N. R. Richards on the Awards Committee. Few who have not seen the extent and, to the writer at least, the complexity of the documentation involved, can appreciate the amount of willing labour involved. The Award Committee is, however, fully rewarded in that the second great step in the evolution of our Foundation is now established and fully operative.

All of which is respectfully submitted,

CHARLES A. SANKEY, 33° Vice-President.

APPENDIX 5

THE SCOTTISH RITE CHARITABLE FOUNDATION OF CANADA

Report of the Vice-President and Chairman of the Awards Committee 1983

During the past year there has been genuine progress coupled with some pertinent expansion in the programs receiving our support.

The N.I.M.R. bursaries (some \$1,500, some \$750) were, as was the case last year, selected by the N.I.M.R. internal committee from nominations from their Provincial associations. The writer screened their list, with final approval of 14 bursaries for a total of \$15,750. With the exception of Miss Nanson, each involved study in a Master's program at a recognized institution.

from British Columbia:

Shirley Coomber, Education and Rehab. Counselling, U.B.C. Anneke Delen-Markus, Education and Teaching,

Okanagan College.

James Sutton, Social Work, U.B.C. Dorothy Hyslop, Psychology, U.B.C.

from Alberta:

Tuula Heinonen, Social Work, McGill University.

from Saskatchewan:

Josephine Nanson, Ph.D. program, Pediatrics, U. of Saskatchewan. Barbara Bond, Psychology, U. of Saskatchewan.

from Ontario:

Sherill Carden, Environmental Studies, York University. Caroline Despard, Community Health (Medicine) U. of T. Catharine Howard, Social Work, U. of T.

from New Brunswick:

Peter McGuire, Rehab. Counselling, Boston University.

from Nova Scotia:

Michael Vining, Physical Education, Dalhousie University.

from Newfoundland and Labrador:

Jane Whitten, Applied Psychology, U. of Toronto. Beverly McLean, Clinical Psychology,

Memorial University.

The writer was assured that Mr. McGuire's course was especially suitable, and that he would be returning to Canada on its completion.

The bursary given last year to Jacqueline Shea at Holland College, P.E.I. was successful. Gordon Bennett reports that Miss Shea graduated with high standing, that Holland College was very pleased with her work and potential, and that she will be working shortly in the M.R. field. In view of this satisfactory result, the writer is recommending to the Directors that the N.I.M.R. be authorized next year to nominate up to four such bursaries, not more than one in any single province, it being understood that some nearby Member of the Foundation will be designated as a contact for that personal touch which means so much to our younger generation.

Larger awards, normally for Doctoral candidates, were also cleared.

as renewals of previous grants:

Patrice Karn, 3rd year postgrad, Psychology, York Univ., \$6,500. Judy Snow, Theology, U. of T. \$6,000.

Miss Snow continues her unremitting efforts, a challenge to each of us as to what can be done if the will is there. The money covers tuition and a companion. Miss Snow spoke at the Toronto Lodge of Perfection dinner before their 4°, the writer and Mr. Jacques Pelletier, Director N.I.M.R., joining her at the head table. It was a very special evening.

and, as new (1st time) grants:

Sherry Winthrope, Master's in Psychology,

York University, \$6,000.

Constance Lamarche, 3rd year postgrad,

Laval University, \$5,000.

Dr. C. Bagley, Social Welfare, U. of Calgary, \$5,000.

Allan Stevens, Ed.D. candidate, U.B.C., \$4,500.

Rosie Persad, Ed.D. candidate, U. of Toronto, \$3,500.

Carolyn Lennox, Ph.D. candidate, Psychology,

York University, \$3,500.

These 8 (2 + 6) grants total \$40,000.

The grant to Dr. Begley is support money to co-ordinate a group working on psycho-social adjustments of children and adolescents with Down's Syndrome.

The writer has files on all the above recipients and can supply additional information by correspondence, if requested.

Our program of significant financial grants towards major research projects has continued and been expanded. Each application has been carefully screened by our Awards Committee and approved by our President before being implemented. Work done during the past year and an indication of present status is as follows:—

1. Dr. Patricia A. Baird and associates, Department of Medical Genetics, University of British Columbia, Vancouver, B. C.

Study of the Marker X Chromosome associated with X-linked Mental Retardation.

This work, now in its 3rd and final year of our original grant commitment had, as its objective, a substantial improvement in the techniques then available for detecting, in womb fluid, the defective labile X-chromosome, which is the principal cause of the excess of male over female genetically-induced retardates, and combining this with reliable identification of carriers prior to conception of a potentially defective male child.

These objectives have been achieved. Specifically, the probability of correct identification of the marker X-chromosome by laboratory culture techniques has been improved several fold. The marker has been identified in fetal tissues. It has been identified in womb fluid and this identification subsequently demonstrated as correct in a male fetus and, most recently, in a paper submitted for publication in July 1983, in a fetus which was a female carrier (this may be a world first). Tests on over 500 "normal" women have failed to yield a false positive test, establishing that the chance of such an incorrect result is minimal, if not zero. The potential accuracy of the new test procedures has made several new research problems concerned with improving knowledge of X-chromosome retardation investigatable. As an added plus, Dr. Baird, Dr. Dill and the group at U.B.C. are mutually cooperating with Dr. Holden and her associates at Oueen's University. through exchange of techniques, cultures and specimens. The techniques and practice of Dr. Baird and her associates have been made available to the medical practitioners in British Columbia.

The project has thus advanced our knowledge of one particular and very important cause of mental retardation to a degree and with an impact which, by itself, would have fully justified our entire grants program to date. Of course, there is more work (lots of it) to be done. There are some tag ends to clear up. There are numerous unanswered questions. There are new related problems to explore. The fact remains that this work has been outstanding. Dr. Baird, Dr. Dill and each of their associates are deserving of our deep appreciation and our warmest congratulations.

Grants to date:-

1st grant	\$25,000
2nd grant	27,500
3rd grant	30,000
	\$82,500

2. Dr. Judith G. Hall, Clinical Genetics Unit, University of British Columbia, Vancouver, B. C.

Maternal Preconception Vitamin Supplementation in the prevention of Neural Tube Defects in British Columbia.

This is a new project which will date from September 1983.

It is generally accepted that there is a 5% chance of a mother with a previous child born with a neural tube defect (spinal bifida) having a similarly defective child from any subsequent pregnancy. Evidence from England that this high risk can be reduced by a vitamin therapy prior to

conception of the new child has attracted international attention, including in the U.S. and Canada. It is recognized that the value of this therapy is not conclusively proven, and that some of the data may not stand up under critical examination. It is suspected that local conditions may have been a factor in some results.

The potential value of a study in Canada is recognized and is supported by Dr. Baird at U.B.C. and by Dr. Lippman at McGill. It has also been approved by the U.B.C. ethics committee. The only reliable background data in Canada on N.T.D. births, including still births, miscarriages and abortions, are in Quebec and in British Columbia. Dr. Hall will attempt to verify or disprove the merit of the vitamin approach, starting with the provincial statistics for contacts and using a designed experiment to, it is hoped, reach a valid conclusion.

The Awards Committee is aware of the difficulties of assuring that the mothers involved who want additional children would share fully with an investigator the highly intimate family relationships involved, and then take part in a statistically designated experiment. The writer laid this squarely on the line to Dr. Hall:—

"--- So each mother will be exposed to an ultimate in medical confidence with someone new. No one is expecting the impossible. There will be, of necessity, cases where cooperation is refused, or avoided, or neglected, or be not reliable.
--- If things turn out to be too difficult can you "face the music and draw the curtain"?

"As you may know, I have had considerable experience in the functioning and management of industrial research. Research does not always work out as planned. In industry, knowing when to say "Stop!" and cut your losses may well be the second most important thing to picking the good ones to start with. Believe me, I have had experience with both! The risk, in your case, is not that of getting a negative result, it is that of not getting a result."

As a further precaution, the Awards Committee approval of a grant was made conditional on Dr. Hall receiving additional appreciable financial support from some other outside source. This took several months to obtain. The Vancouver Foundation has recently approved a grant of \$15,000 to supplement our first contribution. Dr. Hall is now getting a suitable assistant who will be assigned to the problem.

Dr. Hall, an established researcher in her own right, is a member of Dr. Baird's department. The writer believes that the problem will be realistically approached and evaluated. Dr. Lippman (McGill) advises that there is no conflict of interest with her work.

Grants to date:-

1st grant

\$30,000

3. Noreen L. Rudd and associates, Departments of Pediatrics and Medical Biochemistry, University of Calgary, Calgary, Alta.

Assessment of Genetic Screening Techniques in the Prevention of Mental Retardation.

This project is in its 3rd and final year, for which funds were reserved. Its objective was to develop screening techniques which would identify, prior to the conception of a child, couples at risk of producing genetically defective offspring. During its 2nd year work was supplemented, through Dr. R. H. Martin, to include the potential for a Down's male to transmit the Down's syndrome to his children.

For much of the first half of the grant progress was badly hampered by lack of trained support staff. The present year, alone, has seen steady and uninterrupted work.

Special techniques were evolved and employed, subjecting blood leukocyte cells to microneuclei counting, as well as studying exchange of "sister chromatid" cells, each at three levels of an added mutagen.

Dr. Rudd's current report included ms. of 3 papers submitted for publication. The data are based on:—

- 42 "normal" people, incl. 18 couples, = "controls"
- 24 parents, incl. 11 couples, who, before age 32, had had a Down's child or fetus = "trisomics"
- 21 people, incl. 10 couples, where there had been experience with repeated and substantially unexpected miscarriages = "aborters"

The "trisomics" had microneuclei counts in a range from over double that of an average "control" to as low as any individual control test. The corresponding sister chromatid data also overlapped the "controls" but much more moderately. For both tests, the "aborters" tended to be more variable than the "controls", but were not really distinguishable.

Dr. Rudd analyses her data thoroughly, using 95% confidence limits, i.e. a 19:1 bet that the numerical conclusions are valid. As an identification of a potential "trisomic", she found a 67% chance by microneuclei, and a 42% chance by sister chromatid. This can build up to a significant 91% chance where both parents show high tests by both methods. By contrast, even with "optimum" data for prediction, the betting of spotting a potential "aborter" never exceeds 30%. In addition the "controls" could generate up to 11% false positives.

In spite of obvious limitations, the results, as far as "trisomics" are concerned, are encouraging, partly because many medical diagnoses flow from a group of indications (established criteria not being available), and more so because it supports the theory that minor genetic anamolies, as

shown by microneuclei tests, can cause major genetic problems in offspring. This is important as it opens out new potential studies to pinpoint underlying reasons behind the conception of a Down's child.

So much for the statistics. The meaning to an individual, who is never just a statistic to him/her self, is that a high test, especially if combined with a high test of a partner, is a significant danger signal of having a trisomic child. A low test means nothing at all, either good or bad. It merely says that, at least, the test wasn't high.

Grants to date:-

1st grant	\$25,000
2nd grant	27,500
3rd grant	30,000
	\$82,500

4. Dr. Donald T. Whelan and associates, Department of Pediatrics, McMaster University, Hamilton, Ontario

Inborn errors in Metabolism: Organic Acidurias, an Investigation of Excretion Patterns in Infants and Adults.

This project is concerned with the quantitative and semi-quantitative identification of the numerous organic acids in excreta, e.g., urine. Some, maybe 60, of these acids may be associated with genetic errors either as to presence or as to quantity.

The objective is therefore three fold:— (1) to develop an extensive reference file as to frequency of occurrence and concentration range for each individual acid in the normal population; (2) to get as comprehensive data as feasible on mental retardates, on carriers, on families with special genetic history, on anyone with a known or not understood genetic anomoly, looking at the whole spectrum of these acids; and (3) to use data from (1) and (2) to diagnose particular genetic problems, including fetal diagnosis through tests on womb fluid.

The tools being used are gas chromotography and mass spectroscopy. Each of these is capable of screening the whole spectrum of the acids. As would be anticipated, considerable initial work involved standardization and evaluation of techniques, including extraction procedures, becoming "at home" with the sophisticated equipment and finding its limits and limitations.

During the 1st year there have already been some significant discoveries. One concerns a brother and sister, both retarded, including severe speech and language difficulties, but both capable of supervised employment. The sister encountered neurological problems and was hospitalized. This prompted tests on urine, and on blood plasma from the family, and spinal fluid from the sister. Significant amounts of fumaric acid

were found in both the hospitalized sister and her retarded brother. The ms. of a paper for publication indicates this may be a first observation of this acid in such samples. The chemistry of fumaric acid is well known. This permitted a theoretical, but rational, explanation of its formation. There is no evidence that its presence relates to the speech impairment or the retardation, but it is consistent with the thesis that an inherited defect led to its secretion in the renal system and hence to other body fluids.

Two other ms. have been submitted for publication. One deals with a patient with chronic lactic acidosis, due to an enzyme deficiency. Ten different acids were at abnormally high concentrations in the urine. It was concluded that this particular deficiency could now be rapidly identified in infants. The second dealt with fatty acids in the urine of low birthweight infants, and its significance in prescribing diet.

Appropriate samples are being accumulated. These are stored at -20° C. There are also requests for data on samples sent in from other institutions. Tests have started on urine of 0-10 day infants as basic information. The investigators will continue to face the happy, but not easy, problem of selection of samples for analyses most likely to be pertinent.

Grants to date:-

1st grant	\$27,500
2nd grant	30,000
	\$57,500

5. Dr. Donald R. McLachlan, Department of Physiology, University of Toronto, Toronto, Ontario

Neuclear Proteins in Alzheimer's Disease and Down's Syndrome.

This is a new project, officially dating from September 1st, 1983. With it we enter a new field, while remaining strictly within our terms of reference.

Alzheimer's Disease effects a severe mental retardation, as a senile dementia or pre-senile dementia, for which there is no significantly satisfactory method of treatment, let alone any "cure". It is related to Down's Syndrome in that Down's individuals develop the symptoms of Alzheimer's if they survive into their thirties, as many are now doing.

Dr. McLachlan has specialized in this field and has strong grounds for believing that Alzheimer's has its origin in abnormalities developing in certain proteins in the brain, due to syntheses of these proteins not progressing in a "normal" manner. He is investigating, in depth, some possible mechanisms which might alter the course of brain protein synthesis, and seeking means by which such abnormal courses might be inhibited, controlled or prevented.

Dr. McLachlan will be speaking to us at the Supreme Council luncheon on September 16th. His work is of special interest, not only as a new field for

our support, but because the disease has stricken some of our own Brethren and their families.

Grants to date:-

1st grant

\$30,000

6. Dr. Jeanette J. Holden and associates, Department of Biology, Queen's University, Kingston, Ontario.

Identification of the DNA Marker closely linked to the Mutation(s) causing X-linked Mental Retardation.

This is the one "fundamental" study which we support. It is aimed at locating, identifying and defining the particular part of human DNA which is responsible for X-linked mental retardation. This information, whenever and wherever found, is essential to a genuine understanding of the genetic basis of the retardation involved. Its merit is solely in advancing knowledge, making available to others an improved background and, perhaps, a greatly improved background, from which "practical" methods and medical practice can be launched.

It is to be noted that, after I mailed the Annual Report which I presented a year ago in September to the awardees, both Dr. Baird and Dr. Lippman wrote, independently, to express their strong recognition of the value of this kind of work. It is also to be recognized that similar work is in progress at maybe a dozen or so other centres. The Awards Committee's position is that they welcome the opportunity to support one Canadian effort, and will value and applaud such work whenever and wherever it is successful.

The methods being used at Queen's involve:-

(1) A library of DNA sequences was constructed from human/hamster hybrid cells. From some millions of such clones, those containing human X-chromosome sequences, identified using radioactive phosphorous labelled total human DNA, were segregated for further study. This work, largely completed during the 1st year of our support, is now finished, yielding 180 potentially useful sequences.

This special group of sequences were, after additional purification and selection proceedings, reduced to 35 unique X-chromosomal sequences which have been sub-cloned, and are now in use in family and other current studies as probes.

(2) Radioactive labelling, sometimes with tritium, sometimes with phosphorous, is being used to "map", i.e., to locate these unique sequences on the DNA molecule. Five of them appear to map close to the fragile site on the X-chromosome. These are, therefore, especially in the ball park for further experimentation.

(3) Family studies have begun with a carrier mother and two of her retarded sons (Family I). Seventeen of the available probes were tried. Of these, two distinguished between the X-chromosomes of the carrier mother, and one of these mapped close to the fragile site.

In a second family (Family II) three of the probes, including the one close to the fragile site in Family I, appear to distinguish between a normal male and two affected males.

Even the above brief, and highly oversimplified, resumé indicates significant progress in this "needle in the haystack" structure detective problem.

In her report, Dr. Holden includes the ms. of a paper accepted for publication in the American Journal of Medical Genetics:

"The Fragile-X Syndrome IV. An Approach to the Indentification of Linked Restriction Fragment Length Variants (RFLVs)."

The three earlier papers in this series (ms. suppled) are by other members of the group at Queen's, under the general co-ordination of Dr. M. W. Partington. Their emphasis is on detailed physical structure characteristics of affected individuals and of carriers.

Grants towards this project:—

1st grant \$27,500
2nd grant 30,000
\$57,500

7. Dr. Abby Lippman, Department of Epidemiology and Health, McGill University, Montreal, Ouebec.

Genetic Epidemiology of Down's Syndrome and Neural Tube Defects.

Dr. Lippman continues her critical statistical analyses of trends in genetic birth defects, while pursuing her special interests in Down's Syndrome and in Neural Tube Defects (Anencephaly + spinal bifida). She has also served on "expert committees" on the influence, if any, of visual display terminals, and of urea formaldehyde insulation on pregnancy.

Difficulties in reconciling data from Federal and Provincial sources as to genetically defective births are being resolved. In Montreal the rate of Down's births decreased markedly between 1965-6 and 1977-80. Age of child bearing was a principal factor although, remarkably and uniquely, the rate increased in the 30-34 age group. Older women are having fewer children, and improved diagnosis in utero has resulted in increased legal terminations. A ms. is in preparation for publication. Another ms., showing that ultra sound fetal head measurements are not a distinguishing diagnostic

basis for anticipating a Down's child, has been accepted for publication. Further data continue to support the conclusion that younger women carrying a Down's fetus have a higher rate of miscarriage than older women. There may be merit in trying to relate a risk factor for Down's offspring in younger mothers who have a series of miscarriages.

For NTD, the availability of ultra sound to detect anencephaly in utero (brain substance deficiency) has reduced live birth incidence. Change in maternal age patterns has also reduced live NTD live births. There are other factors. Dr. Lippman writes:—

"- - - rates for groups claiming English or French as their mother tongue have dropped (with the "English" drop much more marked than the "French"), the rate among those with "another" mother tongue have increased somewhat since 1961-65."

Dr. Lippman was the first to bring to our attention consideration of vitamin supplementation as a risk-reducing therapy for mothers who had had a NTD child. (cross refer. to Dr. Hall's work). Dr. Lippman hopes to assist with some British and some U.S. studies. She writes:—

"--- It should be emphasized that what seemed at first like a simple project has become terribly complicated and enmeshed in a host of legal and ethical (as well as scientific) problems. In fact, the extent of debate over whether there should or should not be a trial has been sufficient to have generated a book dealing with the issues involved — even before the first eligible family has actually been enrolled in a study."

In another analysis, no correlation was found between fetal growth retardation and incidence of NTD births.

A reprint was provided of a paper "Balanced Translocations Among Couples with Two or More Spontaneous Abortions", Human Genetics 63,252, (1983) 2-3% of individuals from 177 couples in this category had some genetic variant. There were more female such carriers than males.

Dr. Lippman is a consultant to a Ph.D. candidate whose thesis will deal with Maternal reporting of early pregnancy exposures in cases of defective births.

Our congratulations are due Dr. Lippman on the renewal of her appointment as a National Health Scholar. This looks after her personal remuneration. Our funds are used for an assistant, computer work, etc.

Grants to date:-

1st grant	\$25,000
2nd grant	30,000
	\$55,000

8. Dr. Matthew W. Spence and associates, Atlantic Research Centre for Mental Retardation, Halifax, N. S.

Prenatal and Perinatal care and Mental Handicap.

This study originated with a major program in rural Nova Scotia, well supported both federally and provincially, on whether enhanced pre-natal and peri-natal care led to improved birth results. Dr. Spence and his associates became involved because some 1200 detailed case histories would become available for investigation in depth of any births involving retardation or handicap, and permit follow up in later years as desired.

Results of the birth records are now nearly fully analyzed. They are going to shock a lot of people, especially doctors, because no statistically significant difference was found between children born of mothers who had had special pre-natal advice and those born of other mothers with no such special advice. Further, it didn't matter what sub-groups were separated, — smokers, non-smokers, drinkers, abstainers, education of the mother, employment of the mother etc. — within any sub-group there was still no significant difference. The conclusions are, of course, limited by the indices used as measurements, in this case birth weight and still births. Very few people are going to like the results. They will certainly be questioned.

The interest of our Foundation is in the births involving mental retardation and handicap. Births where these appeared are catalogued and a re-screening of all the children is planned at age 3½. The necessary questionnaires, documentation and the basis for data collection are in place because of the larger study. Our interest is not stopped by the negative result from the pre-natal care program. Regardless of the outcome in the followup, the opportunity to get data from a population of this scope was (and is) one not to be missed.

Grants to date:-			
1	st grant	25,000	
2	nd grant	13,000	(amount requested)
3	rd grant	11,500	(amount requested)
		\$49,500	

The writer was asked whether our major grants were strictly limited to a maximum three year tenure. He replied as follows:

"There is no law of the Medes and Persians limiting our grants to three years. This merely seemed (and still seems) a reasonable time for which to make a budgetary commitment, assuming favourable progress. We were not (and are not) interested in "indefinite" commitments. I have little doubt if it were apparent during a 3rd year of a grant that progress towards a principal objective was strongly indicated, that the Committee would probably favourably consider an extension, — but such an extension would never be automatic.

- - An alternate course to asking for a year's extension would be a new application including, if desired, modification of the original project. This would be considered by the Committee on its merits and in line with the funds available at that time."

The thanks of the Foundation are due to our Awards Committee. Dr. Haka-Ikse of the Hospital for Sick Children continues to make her expertise and experience available in full measure. Dr. Hugh Lafave has given pertinent evaluations and has kept C.A.M.R. - N.I.M.R. perspective in view. Because of his other duties, our Sovereign Grand Commander has been unable to be active in our decisions. R. G. Loftus has attended meetings in his place and has joined our other Foundation members, D. M. Fleming and N. R. Richards as integral and valued members of the team.

This was a vintage year for Foundation-sponsored projects. Each one of these lived up fully to, and in some cases significantly exceeded, our considered expectations. Two new worthwhile projects were initiated, one of which brings our future endeavours "closer to home" to all Brethren of our Craft. It would be unrealistic to expect comparable progress every year, but we can and, indeed, we should express our satisfaction and our pleasure with, and our appreciation of current research efforts. We may also couple this with some not unjustifiable pride in the quality and the scope of Canadian research efforts in the field.

As of the date of writing this report, one very interesting new application is on hand. The writer expects that there will be one or two additional new applications before our next Awards Committee meeting. We have a full plate as we move into the future.

All of which is respectfully submitted,

CHARLES A. SANKEY Vice-President.

APPENDIX 6

THE SCOTTISH RITE CHARITABLE FOUNDATION OF CANADA

Report of the Vice-President and Chairman of the Awards Committee 1984

Our Foundation continued to make satisfactory progress during the year. The writer's illness of necessity reduced his activities significantly. From now on, pressures and deadlines will have to be monitored and reduced. The writer is particularly happy that Dr. N. R. Richards will be taking over his duties, although he will remain a member of the Awards Committee. Dr. Richards has prepared several sections of the present Report. Dr. Richards' background in science, and experience of having served as Dean at the University of Guelph, assures the membership and, indeed, all Members of Supreme Council, that the selection and appraisal of projects receiving our financial support will be in good hands.

The N.I.M.R. awarded ten bursaries of \$1,500 each to students in a Master's program at a recognized institution. As in previous years, a first selection was made by an internal N.I.M.R. Committee, and this list was screened by the writer, who reviewed each case with Mr. Jacques Pelletier. The approved list follows:

Mary Rykov, Simon Fraser University
Catherine McCarthy, University of Alberta
Lise Noseworthy, University of Manitoba
James MacLean, University of Western Ontario
Mary Howlett, University of Toronto
Christine Clark, Queen's University
Sandra Gray, Queen's University
Agate Allaire, Universite Laval
Mireille Savoie, University of Moncton
Rick Benson, St. Paul University

In this group, Mary Rykov is somewhat unusual. She is a musician and is studying the use of music and expressive arts in integrated retarded / normal groups. Of the two awards to students at Queen's University, one was proposed for a larger award in view of plans to proceed to a doctorate. Both are, however, now in Master's programs and the amounts were equalized. Mr. Benson is engaged in Pastoral studies, especially as related to the handicapped. The University selected does not necessarily indicate residence. Mr. MacLean comes from P.E.I.

There were four awards of larger amounts for students in Doctoral studies:—

Stephen Beagle, Ed.D. course, University of British Columbia \$3,500

Nola Stephen, Ph.D. course, O.I.S.E., University of Toronto \$3,500

Zana Lutfiyya, Ph.D. course, Syracuse University \$5.000

Sarto Roy, Doctoral student, Special Education, Laval University \$3,500

Mr. Beagle will be developing cost-benefit analyses models for educational and vocational programs for mentally handicapped adults. Miss Stephen will complete her Doctorate requirements this year. Miss Lutfiyya has been very active in work with the retarded in Winnipeg and has undertaken to return to Winnipeg after graduation. She is very highly recommended by Nichola Schaefer of Winnipeg. The writer has been assured again that there are courses at Syracuse University which are not available at Canadian Universities. Miss Lutfiyya is concerned with community involvement and participation of all persons (regardless of disability). She is also concerned with post-public school transition of the handicapped. Mr. Roy is a more mature student who has been active in the field for several years.

The total for the above awards (4 + 10) is \$30,500.

The Bursary program at the undergraduate or college level was expanded in view of last year's experience. Bursaries of \$500 each have been cleared, conditional on proof of registration in the college indicated, to:—

Terre Swan, Douglas College, New Westminster, B.C. Donna Alexander, Lethbridge Community College, Lethbridge, Alta. Benoit-Luc Seguin, Algonquin Community College, Ottawa, Ont. Kathy Bonner, New Brunswick Community College, Saint John, N.B. Diane McCormick, Holland College, Charlottetown, P.E.I.

In each case arrangements will be made with a member of the Foundation, or a senior member of the Rite, to contact the student, if possible to present the N.I.M.R. cheque personally, and to introduce a personal element of interest in the award.

The writer has information on each of the students, both graduate and undergraduate, named above, and more extensive files are available at the N.I.M.R. Additional information can be supplied if necessary.

Significant grants of assistance towards major research projects have continued. As previously, each has been carefully reviewed and approved. Two applications, each of significant merit, were, with some regret, refused by the Awards Committee, one on the ground that it covered too broad a field and was not specific enough to keep under some control, and the other because the Committee concluded that it was not within our terms of reference.

The present status of approved projects is as follows:

1. Dr. Patricia A. Baird and associates, Department of Medical Genetics, University of British Columbia, Vancouver, B.C.

Survival in Down Syndrome

The life span of individuals with Down Syndrome has been changing (as have all life spans) with improvements in medical practice and technology. It is important for planning and for counselling that currently valid survival rates be available. An unusual opportunity to do this exists in British Columbia, where the B.C. Health Surveillance Registry has information on over one million consecutive live-births (1952-1981) with a very high ascertainment of all B.C.-born cases of Down Syndrome — a sampling not only adequately large but quite unique.

A special one-year grant was made to Dr. Baird to supervise analysis of these data, establishing the survival of the Down population in relation to that of the general population in B.C., together with other comparisons with other mentally retarded people in the same data base, matched as to place and year of birth, sex, and the presence or absence of congenital malformations in addition to retardation.

A first report was presented last month (August) at a major genetics conference, and publication is in press. Dr. Baird's preliminary report to us for these meetings can be made available to interested members of Supreme Council on request. The following table, lifted from the report, is of general interest:—

Danasas Cuminal

Percent Survival			
Survival to the end of:	Down syndrome with congenital heart disease	Down syndrome but no congenital disease	General Population of B.C.
1st year	76.3%	90.7%	99.0%
5th year	61.7%	87.2%	98.8%
10th year	58.1%	85.2%	98.6%
20th year	54.7%	82.7%	97.8%
30th year	52.6%	80.2%	96.7%

There is no difference in survival according to the sex of the individual.

It is to be recognized that the above figures are subject to adjustment when work is finalized a few months from now, and is updated by the most recent information on deaths from Statistics Canada.

The Awards Committee has been assured from several sources that this information will be very valuable and useful.

Total grant:— \$11,000 (amount requested)

Study of Marker X Chromosome associated with X-linked Mental Retardation

Our financial support of this highly successful project ended a year ago. This year we have received an additional report from Dr. Dill which documents and emphasizes the limitations in the experimental basis for the very substantial accomplishments flowing from his work. It is the logical kind of thinking to be expected from a dedicated and able research worker, and is further evidence that the right people were working on this program to which we were able to be of financial assistance.

2 Dr. Judith G. Hall, Clinical Genetics Unit, University of British Columbia, Vancouver, B.C.

Maternal Preconception Vitamin Supplementation in the Prevention of Neural Tube Defects in British Columbia

This project is concerned with the possible effect of a vitamin therapy, prior to conception, in reducing the 5% chance of a mother with a previously born child with a neural tube defect (spinal bifida) having a similarly defective child from a subsequent pregnancy. It was approved last year with the recognition that there might be limited participation of the limited group of potential mothers involved, and that the sample size to draw a significant conclusion might not be met. This was set out in the report to the Foundation a year ago. Dr. Hall has organized a serious attempt and has met our condition of obtaining financial support from another source as well as our own. The potential value of a result is not questioned. The viability of the project to get a result will be more clear after a second year of work, and will continue to be closely monitored.

British Columbia is unique (cross-refer to Dr. Baird's work on Survival in Down Syndrome) in its birth records, including still births, miscarriages and abortions. From provincial records and from other sources, Dr. Hall reports identifying some 742 families where there might be interest. Six women are presently participating in the vitamin supplementation. Two of these now have confirmed pregnancies. Nine women are interested but are not planning pregnancy. A student of East Indian background is working with Sikh families. The data are being added to a British study. Dr. Hall advises that 132 women are participating (18 pregnant) at 16 U.K. centres and 11 "overseas centres" (including ours). One normal child has been delivered.

The above clearly illustrates the sampling and the numbers problem. It is sincerely hoped, but not necessarily expected, that a requisite study can be mounted. Progress will be closely watched.

Grants to date:

1st grant \$30,000 2nd grant est. 31,500 if approved by the Awards Committee 3. Dr. Noreen L. Rudd and associates, Departments of Pediatrics and Medical Biochemistry, University of Calgary, Calgary, Alberta

Assessment of Genetic Screening Techniques in the Prevention of Mental Retardation

Dr. Rudd has been working on the development of techniques, using blood leukocyte cells, for pre-conception screening of couples as to risk of producing genetically defective offspring. During the first three years of our support, it was found that a micronuclei counting method had some merit in identifying a predisposition towards conception of a Down's child, and that this risk could be more positively identified if a second method, based on studying exchange of "sister chromatid" cells, also resulted in a high numerical value (although the latter, by itself, was only marginally indicative, at best).

During the current and, presumably, final year of our financial support, work continued of firming up the previous results for publication. Dr. Rudd advises that this paper has been accepted and will be published in the Canadian Journal of Genetics and Cytology in October 1984.

Work has been extended to identify the particular parent who transmitted the Down chromosome abnormality. Findings confirm previous data from other sources that the female is the source of the Down disjunction in about 80% of the cases. Some progress is reported on using a skin biopsy instead of blood leukocyte cells.

The effect of a vitamin therapy on modifying the micronuclei count for a given individual is being investigated. There is at least some evidence appearing that a vitamin intake may moderate the micronucleus frequency in parents of trisomic children. Dietary factory may have an influence on the tests Dr. Rudd has been developing. Environmental factors may also have some effect. The field is very broad and we are just beginning to get a few of the answers. The underlying hope is that if the micronuclei count can be significantly changed by therapy, then such therapy might be useful in the reduction of Down's offspring. This appears to be a long shot, but the potential is too important to neglect. The blind code on Dr. Rudd's experiment will not be broken until the experiment is completed, so there are no results to report.

In her report Dr. Rudd recognizes the necessity of establishing the mean of duplicate cultures to minimize the sampling error which is inevitable with small numbers of micronuclei, and the similar necessity of operator training in identifying the significant details on the slides. Her work is genuine pioneering in a very complex field. Both care and perseverance are always required.

Grants to Dr. Rudd:—

1st grant \$ 25,000

2nd grant 27,500

3rd grant 30,000

4th grant 31,500

\$114,000

4. Dr. Donald T. Whelan and associates, Department of Pediatrics, McMaster University, Hamilton, Ontario

Inborn Errors in Metabolism: Organic Acidurias, an Investigation of Excretion Patterns in Infants and Adults

This project is directed to identifying, both quantitatively and semi-quantitatively, the numerous organic acids in excreta, especially in urine. A primary object is to find out what differences or changes, both in distribution of the acids and in the quantity of each, which accompany changes in metabolism. The portion of the total problem of interest to the Foundation is that certain genetic problems and such conditions as Alzheimer's are likely to produce metabolic changes for which the organic acidurias might provide a diagnostic tool or a measure of the severity of the condition.

Analyses are being carried out using gas chromatography and mass spectrography, both moderately sophisticated but well established techniques which are capable of screening the whole spectrum of the acids once the parameters for the particular mixtures and experimental techniques have been standardized. During the year, the second of our support, some essential fine tuning of the techniques was completed and, as a major task, standardation (in a urine standard) reference data for each of the 30 most frequently occurring acids. With this basis, work is now beginning on the urine of "normal" 1-10 day infants and will be extended to premature infants, children and young adults. At the time of the last report, 47 "normal" infants had been tested and Dr. Whelan requires at least 100 samples in each group to give him the kind of base he needs. The on-line data system of the mass spectrometer is, with appropriate software, being used to produce and assemble the statistical data involved in establishing the quantitative limits or ranges for each of the 30 acids. Acids other than these 30 remain only qualitatively measured as the machine has not been calibrated for these.

In spite of the very considerable amount of work done, it will be obvious that studies *specifically* concerned with mental retardation have been minimal to date. The background reference data, now being accumulated, are essential to subsequent conclusions in the retardation field. Papers are in course of publication on the retarded brother and sister and on the chronic lactic acodosis of a retarded child, both of which were reported last year. Urine samples of children with Reye's syndrome have been obtained, but this condition is, fortunately, rare and more data are needed to establish trends (if any). The complexity of the analyses and the technical competence

involved limit the "productivity" of results and there are also calls for "service" type data in a hospital of the stature of McMaster. One such service test allowed continuation of a threatened pregnancy and the birth of "a normal healthy child" in a family with a medical problem which might well have made this impossible. There are problems of experimental priorities which have to be solved. It is hoped that these can be resolved to both Dr. Whelan's and the Awards Committee's satisfaction.

Grants to date:-

1st grant	\$27,000	
2nd	30,000	
	\$57,500	
3rd grant	est. 31,500	if approved by the Awards Committee

5. Dr. Donald R. McLachlan, Department of Physiology, University of Toronto, Toronto, Ontario

Nuclear Protein in Alzheimer's Disease and Down's Syndrome

We have pleasant memories of the excellent address Dr. McLachlan delivered at our luncheon on September 16, 1983. On that occasion he spoke about research related to the nature, causes and potential treatment of Alzheimer's Disease. He has been generous in speaking to Masonic groups in several areas about his research program. The Charitable Foundation provided funds to Dr. McLachlan for research and the following is a progress report of the activities of the first year.

Work began in September 1983. A technical person was hired with excellent background experience in the field of recombination D.N.A. technology. Her expertise was particularly well suited to test the functional implications of the changes in nuclear proteins associated with Alzheimer's Disease. Dr. McLachlan advises that the work was done in association with Mr. G. Guillmette, a graduate student, Dr. P. N. Lewis, a Chromatin Chemist and Professor in the Department and himself. He has provided the Foundation with an early draft progress report and plans to submit a manuscript for publication in the fall of 1984.

In his original proposal Dr. McLachlan indicated that observations had been made related to an alteration in the structure of chromatin which is unique to Alzheimer's Disease. The alteration is associated with an increase in the HI family of linker histones. He points out that the critical unanswered question is whether there are active genes occluded from normal function in those regions of the D.N.A. which are associated with the increase in HI proteins. The funds provided by our Foundation were applied to test this possibility. The results indicate that genes normally active within healthy human cerebral cortex are either less accessible or suppressed in Alzheimer's Disease.

In his manuscript Dr. McLachlan describes the methods of his research and the results obtained. He concludes that Alzheimer's Disease is a degenerate brain condition associated with brain tissue shrinkage and neuron loss. While the primary events which initiate this degenerative process are known at present, the brain shrinkage appears to be related to reduced protein synthesis which in turn is related to reduced messenger D.N.A. prroduction. The reduced messenger D.N.A. is related to an alteration in the structure of the D.N.A. such that the enzyme D.N.A. polymerase cannot initiate transcription. The change in chromatin structure appears to be related to the increased bending of the linker histones of the HI group. He now proposes to proceed to examine the disorder in the HI group. Work will proceed as previously outlined in the 1983 proposal. To that end he seeks further funding from the Charitable Foundation.

Dr. McLachlan expresses gratitude to the Charitable Foundation and advise that the fund supported the salary, materials and supplies to critically examine gene transcriptional competence in Alzheimer's Disease and further funds will be used to pursue a similar approach to the problem.

Brethren are encouraged to read a report published in the Annals of Neurology, Vol. 15, No. 4, April 1984 by Dr. McLachlan and Associates entitled "Chromatin Structure in Dementia". The article provides interesting results related to research concerned about Alzheimer's Disease in an area in which we have a special interest.

Grants towards this project:—

1st grant

\$31.500

6. Dr. Jeanette J. Holden and associates, Department of Biology, Queen's University, Kingston, Ontario

Identification of the D.N.A. Marker closely linked to the Mutation causing X-linked Mental Retardation

It is appropriate to remind members of the Foundation that this study is best described as fundamental research and is aimed at locating, identifying and defining the particular part of D.N.A. which is responsible for X-linked mental retardation. It is the kind of research activity that is essential to generate background information on which to develop further studies. In this sense its value lies in making available to other researchers a fund of knowledge upon which they can build.

In her report Dr. Holden and associates note that in recent years it has been recognized that the fragile X Syndrome is one of the major genetic forms of mental retardation. Data available and analysed on 206 families with this syndrome determined the following about the inheritance of this disorder.

(1) About 30% of carrier females show mental impairment.

(2) Approximately 50% of carrier females can be detected on the basis of fragile X impression and / or mental impairment. Thus 44% of carrier females can be distinguished from their non-carrier sibs.

(3) The mutation rate for this syndrome has almost an order of magnitude higher than that for Duchene muscular dystrophy.

- (4) New mutations only occur in sperms, meaning that most, if not all, mothers of affected males are carriers. If this is the case, all sisters of affected males are a 50% risk of being carriers and of these, 30% will have some form of mental deficiency.
- (5) Only 82% of males with the mutation are affected and express the fragile X. Thus approximately 18% of the sons of carrier daughters are of normal intelligence and do not express the fragile X. These males cannot be distinguished from their normal male sibs who do not carry the mutation. However, they can pass the mutation on to all their daughters who, in turn, will have retarded sons.

In the report, Dr. Holden reports on areas on which the study has concentrated including collecting blood samples from family members for transformation or direct D.N.A. isolation, obtaining cloned X-chrome sequence popping near the fragile site, identification of restriction fragment length of variants for cloned X chromosome sequences in the general population and in fragile X families and the linkage of the polymorphisms with fragile X syndrome.

Dr. Holden expresses confidence in the progress that is being made in this area and advises of her success in obtaining support for research from the Ontario Mental Health Foundation and that she is seeking support from the Medical Research Council of Canada as well. She expresses her gratitude to the Scottish Rite Charitable Foundation for their financial and moral support.

As a Foundation we are encouraged and pleased with the contribution Dr. Holden and associates are making.

Grants towards this project:—

1st grant \$27,500
2nd grant 30,000
3rd grant 31,500
\$89,000

7. Dr. Abby Lippman, Department of Epidemiology and Health, McGill University, Montreal, Quebec

Genetic Epidemiology of Down's Syndrome and Neural Tube Defects

Dr. Lippman advises that the research she has undertaken with the support of the Scottish Rite Charitable Foundation of Canada has been motivated from the start by an interest in defining intrinsic and extrinsic

factors that identify a couple of at-risk of having an offspring with a problem associated with mental retardation before this event occurs. She points out that information about these factors would make it possible to qualify the risks for specific couples and to define more precisely than we can at present groups (other than those already eligible by virtue of advanced maternal age or having previously had an abnormal child) for whom prenatal diagnosis would be appropriate. She advises that she has continued to be interested in the development and assessment of improved methods for prenatal diagnosis, since these can potentially have a great impact on the frequency of mental retardation among livebirths.

In expressing gratitude to the Scottish Rite Charitable Foundation she indicates that the support has been used for undertaking a series of "miniprojects". Justification for this approach is that the thread that ties these projects together has been their direct relevance to understanding the course of and to developing interventions for the prevention of mental retardation.

She indicates that credit for support has been given to the Scottish Rite Charitable Foundation in all articles derived from the projects listed below:

- A. Descriptive Epidemiology of Down Syndrome and Neural Tube Defects
- B. Vitamin Supplementation and Neural Tube Defects
- C. Fetal Loss Rates in Mothers of Children with Trisomy
- D. Prental Diagnosis Cases
- E. Maternal Reporting of Early Pregnancy Exposures and Recall (Report) Bias
- F. Studies of Couples with Spontaneous Abortion
- G. Fetal Mortality in Families with a Child with a Neural Tube Defect
- H. Early Pregnancy Study
- I. Chorionic Villi Sampling (CVS)

She indicates that during the past six months a group at McGill University have planned and implemented a randomized clinical Trial of Chorionic Villi Sampling (CVS) among women seeking prenatal diagnosis. This to the McGill group's knowledge is the only such trial currently underway in the world at the present moment although several others, including a Canadian collaborative study, are being planned.

The foregoing is but a brief summary of the work being done by Dr. Lippman. The funds provided by the Scottish Rite Charitable Foundation have been used to provide salary support for a research assistant, Ms. Sonia Mandel; for programming and computer changes incurred in data management and analysis; and for other costs (funding of forms, postage, publications, etc.) of our investigations. The present (3rd) grant is the final grant which the Awards Committee will approve under such general terms.

We are pleased with the progress made by Dr. Lippman and the contribution she is making from her research efforts. Dr. Lippman has, at the request of the Awards Committee, submitted a specific project for consideration for future grants.

Grants towards this project:—	
1st grant	\$25,000
2nd grant	30,000
3rd grant	31,500
	\$86,500

On our Awards Committee, Dr. Haka-Ikse of the Hospital for Sick Children has continued to give unstinting valuable and professionally valid advice. Dr. Hugh Lafave has, following serious illness, severed his connection with the C.A.M.R.-N.I.M.R. Mr. Jacques Pelletier has taken his place on our Committee and has provided sound and knowledgeable service through the year. The Foundation representatives on the Committee, D. M. Fleming, R. G. Loftus, and N. R. Richards have each added their perspective in genuinely worthwhile contributions. The sincere thanks of the Foundation are due to each of the members of the Awards Committee.

The second stage in the evolution of our Foundation, providing significant support for major research projects, is now in its fifth year, is firmly established, and is working well. It has given the Foundation a vital and specific objective which, by the inclusion of Alzheimer's disease within its terms of reference has been brought closer to home to the Rite at large.

In addition to promoting Canadian research in the field of metal retardation, there have been secondary benefits in that senior Canadian workers in the field now appreciate that thier efforts are widely recognized by many Canadians, that they are not each isolated and alone, that they have colleagues throughout Canada from east to west.

As I retire as Vice-President and Chairman of the Awards Committee, I can assure each of my brethren of the Rite that full value is being obtained for our donations. I am also convinced that the personal interest of our brethren has promoted our unity, established a new and added justification for our existance as an organization and added significantly to our sense of brotherhood. That makes all the effort we have shared together and will continue to share in the future very well worth while.

All of which is respectfully submitted,

CHARLES A. SANKEY, Vice-President.







